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ABSTRACT

This paper provides an overview of the meaning of retirement (which is considered to be different for every individual); reviews some of the burgeoning literature on retirement issues; discusses briefly the content and approach in six major retirement planning programs; and presents trends in the field and their implications for the future. A computer search of six national data bases, yielding abstracts of 124 resources for preretirement counselors, is included. (Author/LFB)

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COUNSELING FOR PRERETIREMENT

searchlight

Relevant Resources in High Interest Areas

Libby Benjamin

CG 012789

COUNSELING FOR PRERETIREMENT

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AN INFORMATION ANALYSIS PAPER
Based on a Computer Search of National Data Bases
November 1966 through April 1978

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PREFATORY NOTE

All of us want to live a long time. But when our lives have been organized for 60 years or so around work and work relationships, the change to nonwork and leisure is a major life transition that can raise mixed feelings about what later life will mean. Most older people face this challenge with courage and are able to create a satisfactory life for themselves after retirement. For others, retirement is a shock and can lead to feelings of uncertainty, anxiety, uselessness, and low morale. The difference in the quality of postretirement life and in the attitudes of retirees toward that life depends upon realistic knowledge about what to expect and focused preparation for the changes that will occur. Many individuals need help with the transition, and planned programs to meet their need are on the increase.

The purpose of this paper is to provide an overview of the meaning of retirement, which is different for every individual, to review some of the burgeoning literature on retirement issues, to discuss briefly the content and approach in six major retirement planning programs, and to present trends in the field and their implications for the future. Sources for the paper were obtained from a computer search of six national data bases conducted by Adrian Baker, search strategist for the Counseling and Personnel Services Clearinghouse of the Educational Resources Information Center

(ERIC/CAPS) at The University of Michigan, Ann Arbor, Michigan.

In addition, the writer communicated personally with the developers of the six programs cited in the report to determine the goals of each program, type of format, anticipated outcomes, and the degree to which each program was realizing its objectives. Some of the programs brought to light in the search are no longer operating, an outcome which substantiates a fact all developers spoke to: Employees are not yet willing to participate voluntarily and enthusiastically in focused planning for the last quarter of their lives. This situation appears to be changing, however, and the stigma attached to planning for retirement, based on the belief that persons who participate in such planned programs are slated for extinction, is lessening. With preretirement planning programs becoming a built-in component of employee benefits, chances are good that workers will learn to view them as a necessary part of their life planning.

The counselor engaged in helping individuals prepare for retirement must perform a variety of functions: provide information, provide employees with the opportunity to voice concerns and questions, respond to unique needs of individuals, and show special sensitivity to the fact that, as one program developer said, "Anxiety about retirement is really anxiety about aging." Brief sessions that provide information about pension plans and benefits are rapidly expanding into comprehensive planning

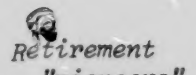
programs offered many years in advance of retirement that include self-exploration and understanding of the aging process. This move toward more, longer, and better quality preretirement planning programs offered early in one's career can only be viewed as positive, and with such help, more individuals should be able to enjoy the comfort and satisfaction that nonworking years can bring.

COUNSELING FOR PRERETIREMENT

Libby Benjamin

Adjustment to retirement from gainful employment has long been recognized as one of the major adaptive tasks of later life. The degree to which this adjustment is successful plays a major role in determining the extent to which individuals find their later years satisfying and rewarding. In a complex technical society retirement does not consist of a relatively simple change in status from the role of worker to that of nonworker but has important interpersonal and intrapersonal implications that affect the retiree's total existence.

Today's retiree might be likened to a pioneer. The retiree's parents did not retire at a specific age. They generally lived shorter lives but worked for longer periods of time. They did not have the benefit of pension funds or medicare or social security. Retirement is a recent development in our society, and those who have gone before have provided few guidelines for persons now at or approaching retirement age.



The Meaning of Retirement

It has been said that the younger the individual, the more glamorous does the period of retirement appear. As the time draws near, however, misgivings begin to

arise and apprehensions mount. For many, preretirement planning poses a threat rather than a chance to prepare for a richer life. Manion (EJ 147 852) views retirement as the first "insult" of aging, as tangible evidence that one is "older," a "senior citizen." Thompson (PA 17027) sees the emotional impact of retirement as similar to the emotional impact of "separation from" or "threatened loss of" significant others; and the disorganizing effects of retirement (or anticipated retirement) as dependent upon the "basic trust" possessed by an individual. The trusting person is less afraid that he/she will have to walk alone. Another important factor is the individual's underlying sense of self-worth. Persons who see themselves as basically worthy will miss less acutely the reassurance which comes from being a worker or doing a worthwhile job.

Retirement as a threat

Retirement can be defined as an adjustment in which responsibilities are reduced and (hopefully) replaced by different kinds of outlets. In cases where work means everything to the individual, the desire to explore and capitalize on alternative outlets is reduced. In other cases retirement can bring into focus a strained marital relationship. For compulsive individuals, retirement may lead to a discomfiting disruption of structure. For persons whose "success" in life is of prime importance, retirement can reduce the source of gratification and lower self-esteem. Organic deterioration may also be a factor in retirement difficulties. Many retirees, in the

Negative outcomes

face of functional and intellectual decline, may criticize themselves unjustly and have unrealistic expectations of their capacity to accomplish tasks.

For other persons, retirement may be a long-anticipated occasion. They look forward to it as a period of potential enrichment which will provide freedom to pursue meaningful hobbies or interests kept long in abeyance, to read, to write, to travel, to move to a more desirable climate, to start a new career, and to search for personal wholeness and individuation. For those to whom financial security is guaranteed, the prospect of retirement is even more golden. Retirement, then, obviously means different things to different people.

Retirement as a challenge

The Need for Preretirement Planning

Work fulfills many basic requirements in life: financial support, activity to fill the hours of the day or night, contact with the community, participation in purposeful existence, comradeship and contact with others, prestige in the family or community, and, hopefully, a sense of satisfaction in new experiences and the chance to be creative. The loss of work can rob a worker of status, purpose, and important relationships. Bortz (PA 09385) quotes the statement of a prominent labor leader who said, "There are deep emotional reasons why workers want to continue to work. It's more than a means of making a living; it's a way of life--life itself."

The meaning of work

Retirement from gainful work to aimless living can set the stage for boredom or anomie, as well as for feelings of hopelessness and confusion, of being "put on the shelf," of loss of the significance of living--a clinical syndrome known as Retirement Shock. The symptoms of retirement shock can produce not only unhappiness but physical symptoms as well. Ellison (1968) has found a significant correlation between illness and the change from the work role to the retired role; others have investigated the surprising numbers of strokes that occur immediately before or immediately after retirement (Greene, et al., 1969, also ED 042 996). Suicides also appear to be exceptionally high during the retirement age years (PA 07380). These are only a few of the indications that many employees experience difficulty in making the transition from work to retirement; and we can expect these problems to be magnified in the future as we move more fully into an automated-cybernetic era, with less physical work for everyone, the strong probability of a lowering retirement age, and an increase in life expectancy.

Retirement and illness

The percentage of older persons in society is rising rapidly. In the United States the number of persons age 65 or over increased from 17 million to over 23 million in ten years, and is expected to multiply at the rate of 350,000 annually. Today the number of people age 65 and over is seven times greater than it was in 1900. The big jump in the percentage of persons older than 65 will come between 2010 and 2020,

Growth of older population

when the post-World War II baby boom generation becomes senior citizens. At that time about one in seven persons will be older than 65; by 2030 the proportion may be one in six. Members of today's middle-aged generation are likely to stay young longer than any generation in history while the age of retirement is likely to move downward. Thus, with an extended life expectancy and the promise of vigorous health into the 80's and 90's, the dilemma of what the content of those postretirement years should be is of dramatic importance.

The background paper on mental health for the White House Conference on Aging (ED 058 541) contained the following statement:

> Retirement has profound implications for changes in an individual's social and economic status, in his interpersonal relationships, and in his self-perception and morale. Increasing evidence indicates that realistic preretirement planning improves the chances of making a good adjustment to retirement. (p. 52)

Mandatory vs. voluntary retirement

Workers today in some settings know that at a specific age retirement will come, and therefore they have the opportunity to make financial and emotional preparations for it. Where the time for retirement is not mandatory and the employee makes the decision, there arises a complex set of forces consisting of pressures to retire and pressures to hang on. This latter group of workers faces the compound problem of feeling anxiety over when to "take the plunge" and working out problems that arise after the new way of life is begun.

For many the terms of retirement are inadequate for their financial needs. But in a larger sense the needs of older people extend beyond monetary considerations. Bortz (PA 09385) interviewed a large number of older persons as to their principal desires and found that these desires could be grouped into five major categories. In order of importance, older people said they wanted (1) good health, (2) gainful and interesting employment, (3) companionship, (4) security, and (5) a sense of dignity in daily living. Studies by Neugarten and her associates (1964) describe the period from 40 to 70 as marked by a shift in perception of the environment from one that rewards boldness and risk-taking to one that is complex and dangerous. It is also a period of change from perceiving the self as having the energy to exploit opportunity to perceiving the self as conforming and accommodating to environmental demands. These changes are not necessarily maladaptive; older persons may continue to function very effectively, but they are sensitive to changes that may adversely affect their status and dignity or impair the power and usefulness of their skills. The challenge of planning for retirement, then, is to integrate strategies that assure security with activities that offer just enough opportunity for meaningful growth.

Desires of older citizens

A Review of the Literature

The literature on adjustment to retirement is extensive, and one notes an ever-increasing move away from remedial, problem-solving assistance to preventive counseling that focuses on informational programs and preretirement counseling (EJ 154 792, 147 860, 147 852, 147 851, for example). Individuals' need for help in preparing for this major life transition is now clearly recognized by universities, public schools, agencies, the armed services, business and industry, and the Federal government.

Retirement a recognized need

Many institutions of higher education have initiated programs not only for their own faculty and staff (ED 138 143) and for members of the community (ED 125 685, 118 191, 081 977) but also for training persons in the knowledge and skills required to conduct preretirement programs in other settings (EJ 158 225, ED 081 984). The Department of Health, Education, and Welfare is responsible for funding a number of research projects on retirement patterns and the nature of responses to the retirement event (ED 119 050), on how to develop and implement a preretirement program (ED 103 633), and on longitudinal studies dealing with the efficacy of various approaches in such programs (ED 081 984, 081 977, 043 816), as well as for sponsoring and implementing the White House Conference on Aging, a comprehensive program that dealt with all aspects of the aging process, the needs of special groups of aged persons, and the role education can play in responding to them (ED 058 541).

Growth of programs and research

A marked increase has occurred in the number of industrial organizations that provide preretirement planning help for their employees (EJ 158 225), although few even yet do more than expose workers to a review of the pension plan shortly before retirement and attempt to answer questions that may arise about retirement issues (PA 07380). Still, this can be viewed as a movement that reflects a real concern for employee welfare. Wermel and Biedeman (1961) found that companies cited most often the following reasons for conducting preretirement counseling: (1) to help employees have a more successful retirement, (2) to encourage older workers to retire, (3) to improve employee and labor relations, (4) to foster good community relations by having retirees become "goodwill ambassadors," and (5) to express growing social and economic responsibility for the welfare of employees.

Employer concern

In this same study the investigators found that meeting individual needs of potential retirees was the greatest concern of the program developers. Some employees begin retirement planning early in life; others are receptive to the idea but put it off until confronted by the company program; others strongly resist the idea of retirement and need extensive individual counseling; and still others refuse to participate at all. The glaring problem is how to make the program flexible, responsive to needs, and voluntary, and yet achieve participation from those who need it most--the resisters and nonplanners.

Reluctance of employees to participate

Models for preretirement counseling proliferate (EJ 158 225, 147 852, 144 971, for example); and while they differ in approach, duration, and format, they are quite consistent in content. Most programs contain information on income and finances, wills and estate planning, continuing education, health, housing, legal affairs, role changing, creative use of time, and attitude adjustment.

The question, "Are these programs effective?" has been answered positively in most of the studies (EJ 147 851, ED 158 225, 042 996, 024 869, PA 01575, for example), although the efficacy of the program depends greatly upon the approach utilized. The small group discussion format which allows participants to voice their concerns and explore issues in a supportive environment, combined with the presentation of solid information about expectations for the future, appears to reduce significantly dissatisfaction and health worries and encourage more active retirement behavior.

Positive program evaluation

A strong support for preretirement programs can also be found from retired employees themselves who believe that company-sponsored programs are a necessity (PA 04316, 09043). Greene, (Greene, et al., 1969), for example, found that 85% of employees questioned wanted employer assistance in preparing for retirement.

Some studies, however, claim minimal or nonsignificant results for preretirement programs. One, conducted through the University of Tel-Aviv, suggests that preretirement counseling schemes may not be able to compensate for failure of individuals to

develop lifelong habits of using free time constructively or to make adequate financial provision for retirement (PA 08758). Another, done at the University of Zurich, found only four marginally significant differences out of a possible eighteen between groups who had experienced a planned program and those who had not (PA 06877). However, in the latter case, the researcher suggests that the method was at fault and recommends that more emphasis be given to an intensive personal and emotional involvement of participants in the learning process, a finding which is corroborated in a number of other studies.

Questionable results

Opinions differ as to the optimum age for starting preretirement planning. Just before one retires is clearly not the best time to conduct a preretirement planning program. In general, most research indicates that the more one prepares in advance for retirement, the more successful will be the transition and the more satisfying the life style. Results of a study by Wexley and others (PA 04660) suggest that the period of 4 to 7 years before retirement may be the critical time to institute retirement planning programs. Financial planning for retirement, however, must begin far earlier. Ideally, preparation for retirement should begin when individuals reach the middle to late 40's and continue with sharpening focus through the 50's and 60's (Quirk, 1976).

Age to start planning

Conflicting research results and a wide range of opinions about the need for and efficacy of planned preretirement programs identify program development, content, and

approach as areas that require further study. One researcher suggests that our methods now are relatively primitive (EJ 112 111) and that the scarcity of pertinent research is a real handicap. Certainly, many factors influence a person's ability to benefit from such a program: adequacy of income, previous social behaviors, amount of education, condition of health, and participation in part-time work (PA 08879). Consideration of these factors, coupled with changes occurring in institutional and economic settings, must lead us to the conclusion that there can be no universal preretirement planning blueprint at present.

Need for research

Retirement Planning Programs

The number of preretirement planning programs currently available or under development seems to be increasing. At least one source for the research base for program content is a recent survey conducted by the American Association of Retired Persons (AARP) of its 11 million members to determine their areas of greatest interest. In order of importance, these areas were: (1) finances, (2) health, (3) housing, (4) social/personal concerns, and (5) use of time. Most established preretirement programs cover each of these areas in varying detail and depth. The various approaches utilized in currently available programs seem to be of three general kinds: (1) small-group interaction, with emphasis on interpersonal, social, and psychological aspects

AARP survey

of retirement; (2) self-instructional approach, including audio-visual media that highlights issues, supplemented by printed materials; and (3) lecture format, with guest speakers, films, and some group discussion. A few programs are presented here as examples of what is currently available, but many other excellent ones could be cited.

1. Action for Independent Maturity

Probably the largest and most experienced active retirement planning program in the United States, Action for Independent Maturity (AIM), is a nonprofit organization devoted to the interests of people between 50 and 65. AIM is a branch of the AARP and offers its members a magazine, "Dynamic Years"; guidebooks on the subject of money management, health, leisure and legal affairs; travel services; pharmacy services; group health services; and life and auto insurance. Nearly 1,000 organizations in the United States are presently using the field-tested AIM materials, which consist of packaged resources and filmstrips that are motivational rather than instructional in nature.

Also available is an Employer's Information Kit for interested purchasers of the program. In eight sessions AIM covers the following basic areas of concern for retirees: the challenge of retirement, health and safety, housing and location, legal affairs, attitude and role adjustments, meaningful use of time, sources and amounts of

income, and financial planning. Seminars are kept small so that everyone has an opportunity to participate.

AIM has several unique features. For example, participants are given "planning starters" for use during and after the program, and they complete practical tasks at home to encourage spouses to work and plan together. Spouses are encouraged to participate, and group members help to introduce and present each session.

Special programs developed by AIM to train discussion leaders have increased in popularity and are now offered monthly in various locations about the country. Limited to 16 persons, these 5-day, in-depth programs include manuals for potential trainees to study in advance, instruction by experienced faculty, lectures, films, case discussions and role playing.

2. University of Chicago

Begun over 25 years ago, the University of Chicago, through its Retirement Studies Division of the Industrial Relations Center (RSD/IRC), offers twice yearly a concentrated, 3-day, on-campus training program to teach individuals recommended by their organizations to become program leaders in their own work settings. The program was developed from a grass-roots base, through personal interviews with retirees in trailer camps, retirement homes, and centers for the aging. Retirees were asked, in effect, "If you knew then (before retirement) what you know now,

what kinds of information would have been most helpful?" Materials consist of 12 booklets written by acknowledged experts on retirement issues similar to those in the AIM program, with the addition of topics such as the physical side of aging, the meaning of work, and relationships with family and friends.

Designed for employees 55 years and older (10 years from retirement), the program consists of two major approaches: (1) basic preretirement planning information, and (2) changing behavior by stimulating the preretiree to plan actively for retirement. Sessions are limited to approximately 12 individuals and their spouses (who attend without charge), and the program consumes ten or twelve 2-hour sessions, the format depending upon the wishes of the company.

As a spin-off from the program, the RSD/IRC at present is collaborating with a large accounting firm in submitting a proposal to conduct an encapsulated, 10-hour version of the program in a number of centers in Illinois for the State's 80,000 civil-service employees.

3. Retirement Services, Inc.

The goal of the Retirement Services, Inc. (RSI) program is for individuals to achieve behavioral change that persists after the conclusion of the training experience. Through a combination of the presentation of factual information and small-group interaction, participants work to develop skills in life planning, communications,

problem-solving, self-diagnosis, and decision-making; to achieve attitudinal change from dependence to independence; and to become aware of retirement decision options.

RSI consists of 16 hours of lectures and activities dealing with basic retirement issues approached from the perspective of motivation, optimism, and planning for rewarding living in the second half of life. RSI was one of three models researched by the Andrus Gerontology Center at the University of Southern California, and the procedures were found to produce the most significant participant gains in attitudes and post-workshop planning behaviors for participants of the models tested. Designed for persons 50 years and older, the program is now in use in many settings in the western United States.

4. The University of Michigan

Twenty years ago, Dr. W. W. Hunter sensed a growing need for planned experiences to assist persons to prepare for retirement. The University of Michigan preretirement education program is a result of his efforts and is now an ongoing part of the University's benefit structure for employees. In addition the University offers a regular course in preretirement planning and a one-week training program for prospective program leaders.

The usual format consists of five or six 2-hour sessions on basic retirement

concerns, with guest experts as lecturers (lawyers, medical personnel, accountants, physical fitness experts, and counselors); films, filmstrips, and printed materials; and small-group discussions. Five programs a year are now offered on the University campus.

5. Manpower Education Institute

"Ready or Not," the retirement planning program sponsored by the Manpower Education Institute and started in 1975, consists of 10 half-hour films or video cassettes on different retirement concerns, a manual for each viewer, and a discussion leader's guide. Offered by various American companies, banks, unions, and community colleges, the program is also used in settings in Canada and Hawaii. MEI helps organizations to set up the program, and once it is adopted, keeps in communication with a follow-up monthly newsletter. Developers are proud of the fact that the Conference Board, a nonprofit institution that conducts research for all major companies, used "Ready or Not" as a demonstration, exemplary program for its most recent conference.

6. University of Southern California

The "Preretirement and Life Planning" program sponsored by the Andrus Gerontology Center was developed initially from a project funded by HEW in 1974. The program utilizes an eclectic approach based on motivational small-group processes combined with information and media. Essentially, the goal of the program is to train trainers

to be creative designers of programs that will meet the needs of their own particular groups. Trainers acquire 10 loose-leaf folders of materials and then adapt them in any way that seems appropriate. Programs are conducted on campus and elsewhere, and extend from 1-day, compact experiences to 2-week summer workshops. The grid system utilized in the program allows tremendous flexibility, and clients range from high school age to retired persons, with incomes of under $5,000/year to over $200,000/year.

The program at present has a three-dimensional focus: middle-aged persons, individuals who are already retired, and a demonstration program for high school juniors and students in continuation schools. In all cases, participants exhibit significant positive changes in attitudes, behaviors, and information growth.

To conduct the program, 49 persons have been trained as group facilitators, with educational backgrounds ranging from less than third-grade education to post-doctoral. Over 4,000 persons have been through the program to date, and the attrition rate is less than 1%.

In its latest attempt to meet the needs of less-than-middle-income families, the program has trained 23 low-income persons to provide middle-aged and older adults with information on basic retirement issues. Life planning is the theme, and this program is attempting to help individuals at all levels and in a wide range of age groups to create satisfying future life styles.

Patterns of Change and Implications for the Future

Several patterns of change are having impact on decisions about preretirement education--patterns that could form the basis for future action.

The first change may be observed in older individuals themselves, who are taking an increasingly active role in planning for retirement and for their future security. Retirement benefits, for example, are often a major issue today in negotiations about working contracts. Workers no longer consider pension or social security as rewards for devoted service--rather, they view these benefits as deferred earnings and feel that adequate compensation during retirement is an earned right. More and more workers are also exercising early retirement options and indicating interest in retirement planning at an earlier age.

Preretirees

Society itself is responsible for the second major pattern of change. Advocate organizations for older persons are growing rapidly, and there are growing indications that consciousness about the problems of aging and responsibility for the older population is rising. The Older Americans Act in the United States is being revised and expanded; the American Rural and Guidance Association has established a Committee on Aging; the American Association for Retired Persons grows ever stronger; medical knowledge about aging is becoming more sophisticated; the media are beginning to

Society

present older people as real, complex, vital, and exceedingly human beings; community, regional, state, and Federal programs for helping older people are commanding a larger share in budgets; and momentum is gathering in counseling and related services for the older population. In short, we may be on the verge of a full-blown movement that will succeed in changing us from a youth-oriented society to one in which "wrinkles are wonderful."

The third pattern of change has to do with employers, who are showing increasing awareness of their responsibilities for providing employees with opportunities for formal preretirement planning. Employers are beginning to sponsor preretirement planning programs on company time, and the trend seems to be not only to fulfill the provisions of the pension plan and make employees aware of their entitlements, but also to build in experiences that deal with other areas of planning needs and motivate employees to engage in active, realistic, meaningful planning for their nonworking years.

Employers

Fourth, more research is being undertaken by institutions of higher education into the variables that contribute to retirement satisfaction and the optimum content and approach in preretirement education. Though present research consistently reveals that the most important factors in retirement adjustment are realistic expectations about what retirement will mean, favorable attitudes toward retirement,

Research

and planning for retirement (one researcher states decisively, "Those who plan well adjust well" [EJ 150 942]), few programs deal with all of these issues. Studies have shown that as preretirees explore their attitudes, values, needs, and fears in an encouraging environment with their peers, they move toward identification of personal problems and to a commitment to problem-solving, planning, and self-actualizing behaviors. Use of this model has the potential for keeping programs from becoming standardized in content and assisting them to respond to the needs of individual members far more effectively. Much more research is needed, but present signs are encouraging.

These patterns of change have far-reaching implications for the future. We may expect that governmental agencies will join with educational institutions and labor and industry in recognizing the need for preretirement planning and furthering preretirement education. This support may take many forms: funding research, establishing in-plant programs, encouraging pilot projects, underwriting community programs, paying tuition for preretirees who attend planning classes, and training individuals to develop and conduct preretirement planning programs.

Cooperative program development

It is likely, too, that repercussions of the trend toward mandatory retirement will cause organizations, companies, and unions to integrate preretirement programs into the benefit structure and to improve the quality and extent of the programs provided, and will create a more interactive, responsive, and responsible relationship

Employer commitment

between employers and workers.

In the years ahead, increasing numbers of institutions of higher education will train specialists in gerontology who can deliver services to older persons in a variety of settings. Counselor education programs will incorporate the teaching of strategies and techniques to assist individuals to deal with such major life transitions as retirement and aging, with an emphasis on preventive counseling and on realistic planning over the life span. Community colleges and adult education programs are in a uniquely advantageous position to utilize the talents of these trained specialists and to deliver the kinds of services that are now being demanded. In addition to basic information about retirement planning, they will offer specialized courses in money management, sexuality in aging, problems of widow- and widowerhood and second marriages.

Increase in trained specialists

Finally, it is expected that preretirees themselves will perceive more clearly the need for planning, and for planning early. In April 1975 the National Council on Aging (NCOA) released the results of the most extensive study ever conducted about attitudes toward aging (Harris and Associates, 1975). Results indicate that today's older people have prepared themselves on many of the items they consider to be important, but remain underprepared in four areas: accumulating savings, preparing a will, planning new employment, and enrolling in retirement counseling programs. Only 8%

NCOA study

of those over 64 had taken a retirement preparation course and only 2% said they planned to in the future. All of the program developers consulted in this research indicate that employees resist opportunities to participate in preretirement planning programs, perceiving them as the precursor to being ousted from their jobs or as something they can do "later." Thus, it is clear that although employers are broadening their responsibilities by instituting retirement planning experiences, only a small portion of the work force is taking advantage of them. As the work week and the work life shorten, as workers internalize the concept that the last fourth of their life will be spent in retirement, and as employers and the media stress preretirement planning as a necessity, employees' attitudes should change from procrastination or reluctance to a positive interest in planning and exploring options for a rewarding future.

Increased participation by employees

Summary

Retirement is a certainty in our world of change. Because our society is work-oriented and youth-oriented, retirement can produce a real identity crisis and contribute to a loss of interest in living. Planning for retirement, however, can do much to avert the retirement shock syndrome and the mistakes and frustrations

that accompany a trial-and-error adjustment after retirement. Research clearly demonstrates that preretirement programs serve to encourage individuals to think and plan ahead and ease their transition from work to nonwork.

The crisis for many persons facing retirement is the change itself--the move from work-filled days and the sense of being important to others to an unknown status of possible boredom, anomie, and purposeless living. But a crisis presents opportunity. In fact, the Chinese character for "crisis" is a combination of two symbols: one representing danger, the other, opportunity. As one author said, "It is not what one retires from but what one retires to that makes the difference" (PA09385). Planning in advance can help individuals to capitalize on new opportunities and make the later years of life a period of continuing personal growth and satisfaction.

Opportunity in change

PRERETIREMENT PLANNING PROGRAMS

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REFERENCES NOT FROM COMPUTER SEARCH

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Greene, M. R., Pyron, H. C., Manion, U. V., & Winklevoss, H. Personnel policy, retirement adjustment, and old age. Research sponsored by the Administration on Aging, Department of HEW, University of Oregon, 1969.

Manion, U. V. Issues and trends in preretirement education. Industrial Gerontology, Fall 1974, 1(4), 28-36.

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Quirk, D. A. Life-span opportunities for the older adult. Personnel and Guidance Journal, November 1976, 55(3), 140-142.

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COMPUTER SEARCH

Data Bases Searched	Number of Resources
Educational Resources Information Center (ERIC)	36
National Technical Information Service (NTIS)	8
Social Scisearch	23
Psychological Abstracts (PA)	32
Comprehensive Dissertation Abstracts	23
Sociological Abstracts	2
Total	124

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User1210   Date: 2may78   Time:11:18:11   File:  1

Set Items Description
  1     2 PRERETIREMENT(F)COUNSELING/TI
  2     8 PRERETIREMENT(F)COUNSELING
  3     0 PRE-RETIREMENT
  4    36 PRERETIREMENT

Print 4/5/1-36

Search Time:  0.058   Prints:  36   Descs.:  5
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Print 4/5/1-36
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EJ163423 AA526121
Set Retirement Goals Early
Cooper, Frayda
Instructor, 86, 7, 46-8 Mar 77
"Retirement does not change a person, it only makes a person more of what he or she has been," says the author. A book editor who has worked with the elderly and taught preretirement courses, she provides sound advice for the teacher about to retire. (Editor/RK)
Descriptors: *Teacher Retirement/ *Teacher Welfare/ *Older Adults/ *Program Planning/ *Program Proposals

EJ158225 CE506246
Group Preretirement Education Programs: Whither the Proliferation?
Reich, Murray H.
Industrial Gerontology, 4, 1, 29-43 Win 77
A survey of the literature concerned with the recent growth of group preretirement education programs shows a marked increase in the field among a wide range of professionals in both education and industry. Five variables are discussed: Size of group, age of participants, length of programs, mix of participants, and program topics. The article states that such programs are productive and valuable and suggests more use of experienced professional group facilitators in the programs. (MF)
Descriptors: *Counseling Programs/ *Group Counseling/ *Retirement/ *Middle Aged/ Literature Reviews/ Surveys/ Age Groups/ Individual Differences/ Program Content/ Trend Analysis

EJ154792 CG512028
Andragogy and the Aging Adult Learner
Meyer, Sheldon L.
Educational Gerontology, 2, 2, 115-122 Apr 77
Andragogy is discussed as a relevant participatory adult education technique. The applicability of andragogy as a preretirement education process is explained and the task-oriented training model of preretirement education is discussed. Aging adults are competent, capable learners, and the andragogical process is one very effective way of assuring this end. (Author)
Descriptors: *Educational Gerontology/ *Older Adults/ *Educational Strategies/ *Learning Processes/ Models/ State Of The Art Reviews/ Adult Education
Identifiers: *Andragogy

EJ150942 CE505804
Effects of Preretirement Planning on the Retirement Adjustment of Military Personnel
Fuller, Robert L.; Redfering, David L.
Sociology of Work and Occupations, 3, 4, 479-487 Nov 76
It was hypothesized that adjustment to retirement would be more successfully accomplished by enlisted men than by officers regardless of how well they planned or how long they had been retired. Effects of all factors were found to be nonsignificant with the exception of preretirement planning. Those who planned well adjusted well, regardless of rank or number of years retired. (Editor/TA)
Descriptors: *Retirement/ *Career Planning/ *Career Change/ *Vocational Adjustment/ *Military Personnel/ Social Adjustment / Social Status/ Enlisted Personnel/ Officer Personnel/ Vocational Development

EJ147860 CG511361
Counseling the Elderly: Remediation Plus Prevention
Lombana, Judy H.
Personnel and Guidance Journal, 55, 3, 143-144 Nov 76
Counseling can be a moving force behind changing attitudes toward the elderly. The author defines remedial counseling as counseling older adults with specific problems, while preventative counseling focuses on preretirement counseling and informational programs. (Author/HMV)
Descriptors: *Helping Relationship/ *Older Adults/ *Senior Citizens/ *Adult Counseling/ *Changing Attitudes/ State Of The Art Reviews/ Gerontology/ Adult Development/ Social Attitudes

EJ147852 CG511353
Preretirement Counseling: The Need for a New Approach
Manion, U. Vincent
Personnel and Guidance Journal, 55, 3, 119-121 Nov 76
The author presents a pre-retirement counseling model which combines both planning and counseling aspects by emphasizing individual responsibilities for planning. As part of the process, peer counseling is utilized in identifying problems and possible solutions. (Author)
Descriptors: *Retirement/ *Adult Counseling/ *Adjustment (To Environment)/ *Older Adults/ *Counseling Programs/ *Peer Counseling/ Senior Citizens/ Models/ Program Descriptions

DIALOG File1: ERIC 66-APR78 (Item 7 of 36) User1210 2may78

EJ147851 CG511352
Preretirement Planning: Does It Prevent Postretirement Shock?
Ullman, Charles A.
Personnel and Guidance Journal, 55, 3, 115-118 Nov 76
Retirement counseling offers assistance to the person who lacks either the knowledge or the skills to define or solve the problems that arise in this later stage of life. (Author)
Descriptors: *Helping Relationship/ *Retirement/ *Adult Counseling/ *Older Adults/ *Senior Citizens/ *Adjustment (To Environment)/ Adjustment Counselors/ State Of The Art Reviews/ Adult Development/ Benavior Patterns

EJ144971 HE507850
Preretirement Planning Programs
Brenner, Herbert T.; Linnell, Robert H.
Journal of the College and University Personnel Association, 27, 3, 77-89 Jul-Aug 76
An overview of preretirement program models is presented, dealing with such concerns as finances, health, housing, social and personal factors, and use of time. Specific programs are reviewed, and sources for additional information are identified. (LBH)
Descriptors: *Higher Education/ *Retirement/ *Older Adults/ *Senior Citizens/ *Program Planning/ *Age/ *Labor Force Nonparticipants/ Housewives

EJ141940 SP504620
Learning and Planning for Retirement
Weiss, Caroline R.
Journal of Physical Education and Recreation, 47, 3, 51-2 Mar 76
Education for the leisure of retirement is discussed from the perspectives of considerations related to leisure in later life, the delivery of preretirement counseling and information, and the current status of education for leisure in schools. (GW)
Descriptors: *Leisure Time/ *Retirement/ *Counseling/ *School Responsibility/ *Senior Citizens/ Psychological Needs/ Social Relations/ Organizations (Groups)/ Industry

EJ125506 CG509166
The Efficacy of Preretirement Preparation Programs for Industrial Workers
Glamser, Francis D.; DeJong, Gordon F.
Journal of Gerontology, 30, 5, 595-600 Sep 75
The ability of preretirement programs to generate changes facilitating the transition to retirement was investigated. A research design was employed to evaluate a group discussion program and an individual briefing program. Group discussion program was effective in increasing knowledge of retirement issues. Effectiveness of individual briefing program was minimal. (Author)
Descriptors: *Older Adults/ *Senior Citizens/ *Retirement/ *Intervention/ *Males/ Research Projects/ Psychoeducational Processes/ Program Development/ Industrial Personnel/ Change Strategies

EJ118843 CE503129
Probing the Preretirement Years
Perlman, Laura
Manpower, 7, 6, 11-5 Jun 75
To find out what happens to a major segment of the working population over several years, the Manpower Administration is sponsoring a 10-year study on the work lives of middle-aged men. The article discusses data from a monograph reporting the completion of the first half of the study. (Author/AJ)
Descriptors: *Males/ *Statistical Studies/ *Employment/ *Middle Aged/ Negroes/ Caucasians/ Comparative Analysis/ Employment Experience/ Government Publications/ Economic Factors
Identifiers: Manpower Administration

EJ112111 CE502459
Preretirement Education: What It's All About
Marcus, Edward E.
Australian Journal of Adult Education, 14, 3, 105-11 Nov 74
The paper's approach is sociological; its thesis is that preretirement education at this time constitutes resocialization of the aging individual carried on in a relatively primitive fashion. The scarcity of pertinent research is handicapping, and the author points out areas where research is most needed. (AJ)
Descriptors: *Retirement/ *Education/ *Adult Education/ *Educational Needs/ *Research Needs/ Older Adults/ Senior Citizens/ Educational Sociology/ Social Factors/ Social Responsibility

EJ107092 CE502080
Issues and Trends in Preretirement Education
Manion, U. Vincent
Industrial Gerontology, 1, 4, 28-36 F 74
Descriptors: *Retirement/ *Older Adults/ *Educational Needs/ *Trend Analysis/ Futures (Of Society)/ Adult Education/ Government Role/ School Industry Relationship/ Community Colleges/ Social Problems
Identifiers: *Employer Responsibility/ Industry Responsibility

55

56

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EJ077709 VT504828
A Preretirement Program That Works
Christrup, Helen
Journal of Home Economics, 65, 4, 20-22 Apr 73
Descriptors: *Educational Programs/ Older Adults/ *Program Descriptions/ *Retirement/ *Senior Citizens
Identifiers: *Preretirement Programs

ED140167 CG011446
Primary Prevention for the Senior Citizen: The Preparation for Retirement Program.
Braverman, Joseph
74 18p.; Paper not available in hard copy due to marginal legibility of original document.
EDRS Price MF-$0.83 Plus Postage. HC Not Available from EDRS.
The history, rationale and methodology of the preretirement preparation program in the format of a group educational experience is traced from its origin 30 years ago by the gerontologist W. Hunter to the present. The program is described and discussed in detail, in terms of content and theoretical dynamics. As retirement is often a psycho-social crisis the program is also reviewed in terms of "crisis intervention" theory. The psychiatrist or psychologist has several key roles to play in these programs; as a consultant and lecturer for the animator training program as well as direct participation in programs as the invited expert for the session on psychological adjustment and mental health. Possible methods of measuring and evaluating effectiveness as a preventive measure are also briefly discussed. A content summary outlining the eight sessions comprising the typical program is provided. (Author)
Descriptors: *Adjustment (to Environment)/ *Counselor Role/ Crisis Therapy/ *Gerontology/ Group Guidance/ Mental Health/ Prevention/ Program Guides/ Psychiatric Services/ *Retirement/ *Senior Citizens/ *Sociopsychological Services

ED138143 HE008796
The Faculty Salary and Budget Committee Report on Early Retirement (Grand Valley State Colleges, Michigan).
King, Judith D.; And Others
28 Feb 77 13p.
EDRS Price MF-$0.83 HC-$1.67 Plus Postage.
At Grand Valley State Colleges an early retirement program for faculty was proposed as a contingency plan for potential enrollment shifts or declines. In this analysis, as a preliminary to the institution of such a program, a number of questions are considered in detail: potential benefits; principles on which the institution should base the plan; eligibility; the option of phased retirement (the Dartmouth Plan); preretirement counseling; financial implications for the institution; and financial implications for the retiree. A bibliography is included. (MSE)
Descriptors: Bibliographies/ *College Faculty/ Comparative Analysis/ Counseling Programs/ *Educational Finance/ Enrollment Trends/ *Higher Education/ *Income/ Planning/ *Retirement/ Salaries/ *State Colleges
Identifiers: *Early Retirement/ *Grant Valley State Colleges MI/ Michigan

ED128950 EA008726
School Employes Retirement. Suggested Personnel Policy Guidelines for School Districts.
Oregon State Dept. of Education, Salem. Div. of Administrative Support.
Aug 76 17p.
EDRS Price MF-$0.83 HC-$1.67 Plus Postage.
This document was developed to help school administrators plan procedures to assist district staff prepare for retirement. A district is not required to offer the services suggested in these pages. Furthermore, this document is not intended for and should not be used as a handbook or guide to be given to district employees. However, a district may find that the services outlined here may be a significant contribution to teacher welfare. The major services outlined are an introduction to retirement planning, early preparation for retirement, and preretirement counseling. (Author/IRT)
Descriptors: Elementary Secondary Education/ Employees/ *Retirement/ School Systems/ Teacher Retirement

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ED125685 JC760360
Shasta College Senior Programs and Services.
Greenleaf, George A.
23 Jun 76 19p.; Prepared for the Board of Trustees, Shasta-Tehama-Trinity Joint Community College District, Redding, California. For a related document see ED 116 747
EDRS Price MF-$0.83 HC-$1.67 Plus Postage.
This document provides an evaluation of the progress Shasta College has made in carrying out task force recommendations for providing services for the older adult population in the college district. Specific actions taken to set up a program for the aging have included the appointment of a college coordinator to institute programs and services relating to the aging, the establishment of an advisory committee, participation of personnel in conferences on the aging, and publicity on the availability of programs on the aging. Programmatic implementation has included: a successful fee workshop on preretirement; development of a new credit course "Introduction to Gerontology (Concepts and Issues Related to aging)"; cooperation with senior citizen associations; the development of tapes to be aired on local radio and television stations on a variety of subjects and themes relating to the older adult. Further directions for the future are suggested, and papers relevant to the development of the "Introduction to Gerontology" course are appended. (NHM)
Descriptors: Advisory Committees/ Community Colleges/ Community Services/ *Gerontology/ *Junior Colleges/ *Older Adults/ *Program Development/ Program Planning/ Publicize/ *Senior Citizens
Identifiers: Shasta College

ED122181 CG010512
A Self-Report Measure of Life Satisfaction in Retirement.
Heflin, Thomas L.
69 13p.
EDRS Price MF-$0.83 HC-$1.67 Plus Postage
This research report had as its main purpose the derivation of a self-report measure of life satisfaction in retirement through the use of a mathematical technique known as factor analysis. Data on questions which have been used to measure moral, life satisfaction, and preretirement attitudes were collected from 123 retired male workers from a large urban area in California. Theoretical concepts identified by previous workers as being important to life satisfaction in retirement--resolution and fortitude, self-concept, desired versus achieved goals, zest versus apathy, and mood tone--were compared to the item content of each cluster produced in the factor analysis. The results indicated that the theoretical constructs of life satisfaction were evident in the self-report measure, and the measure was accepted as being an indicator of life satisfaction in retirement. (Author)
Descriptors: *Attitudes/ Factor Analysis/ *Goal Orientation/ Males/ *Measurement Instruments/ *Older Adults/ Questionnaires / *Retirement/ Self Concept/ Self Evaluation
Identifiers: *Life Satisfaction

ED119050 CG010356
Retirement Patterns and Predictions.
Sheldon, Alan; And Others
National Inst. of Mental Health (DHEW), Rockville, Md.
75 156p.
Report No.: DHEW-ADM-74-49
Available from: Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402 (Stock No. 1724-00388, $1.75)
EDRS Price MF-$0.83 HC-$8.69 Plus Postage
Adjustment to retirement from gainful employment has long been recognized as one of the major adaptive tasks of later life. The degree to which this adjustment is successful often plays a major role in determining the extent to which an individual finds his later years satisfying and rewarding. In a complex technical society retirement does not consist of a relatively simple change in status from the role of worker to that of nonworker, but has important interpersonal and intrapersonal implications that affect the retired person's personal and social existence. This monograph describes the results of a study of compulsory retirement among urban males and females. The data reported are largely concerned with the prediction and nature of responses to the retirement event, and implications of these for the development of preretirement programs. (Author/HMV)
Descriptors: *Adjustment Problems/ Age Groups/ Behavioral Science Research/ *Older Adults/ Psychological Patterns/ Research Projects/ *Retirement/ *Role Theory/ *Senior Citizens

ED118191 JC760117
The Role of the Two-Year College and the Aging.
Dudding, Griffith
Lehigh County Community Coll., Schnecksville, Pa.
6p.; Not available in hard copy due to marginal legibility of original document
EDRS Price MF-$0.83 Plus Postage. HC Not Available from EDRS.
Lehigh County Community College has made inroads in providing education to meet the needs of the elderly in four areas: (1) development of campus policy regarding the elderly; (2) establishment of community-based courses and activities for the elderly; (3) establishment of training programs for personnel in agencies that work with the elderly, and for private business owners who employ the elderly; (4) identification of the campus as a center for advocacy for the elderly. Specific achievements in each of these four areas are delineated in this document. For example, Lehigh has established a no-tuition policy for senior citizens; has introduced a Social Gerontology course into the curriculum; has employed senior citizens on campus; has established a community-based film series, a "Nutrition Bingo Program," and courses in such subjects as decoupage, ceramics, and creative home decorations; has offered conferences entitled "Changing Perceptives of Mental Health and the Elderly," "Modified Therapeutic Communities Conference," "Lutheran Chaplaincy Training Conference," and "Preretirement Planning"; subscribes to and supports groups such as the Gray Panthers and the Pennsylvania Association for Older Persons; and has created a Speaker's Bureau for the Elderly. (NHM)
Descriptors: Community Involvement/ *Community Service Programs/ *Educational Needs/ *Junior Colleges/ *Older Adults/ Program Descriptions/ School Community Relationship/ *Senior Citizens
Identifiers: Lehigh County Community College

ED103633 CE003231
Planning for Retirement: How to Prepare and Present a Pre-Retirement Program.
Massachusetts Univ., Amherst. Labor Relations and Research Center.
70 9p.
Sponsoring Agency: Administration on Aging (DHEW), Washington, D.C.
EDRS Price MF-$0.76 HC-$1.58 PLUS POSTAGE
The history of the labor unions has been a history of men helping their fellows. Preretirement counseling and guidance is clearly an area where the labor unions could continue their heritage of collective self-help. The retiree faces new problems in Social Security and Medicare, health and nutrition, financial and legal adjustments, time and leisure, a host of consumer problems, housing, and taxes, in addition to making ends meet. The initial impetus for the development of a preretirement program may come from any source: union officials, union members, company officials, community agencies, those recently retired, or even an outside agency. The first step is the formation of a special committee to develop a preretirement program. The committee performs a number of functions: (1) recruitment of the persons expecting to retire in the next five years, (2) selection of a meeting place, (3) planning for subject matter and locating resource persons. Suggestions for recruiting students and running programs and a program outline are provided. (BP)
Descriptors: Community Resources/ Older Adults/ Planning/ Program Content/ *Program Planning/ *Retirement
Identifiers: *Retirement Planning

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ED099541 95 CE002626
Education for the Aging: Living with a Purpose as Older Adults through Education: An Overview of Current Developments.
Grabowski, Stanley M., Ed.; Mason, W. Dean, Ed.
Syracuse Univ., N.Y. ERIC Clearinghouse on Adult Education.
74 366p.
Sponsoring Agency: Office of Education (DHEW), Washington, D.C.
Available from: Adult Education Association of the U.S.A., 810 18th Street, N.W., Washington, D.C. 20006 ($7.50)
EDRS Price MF-$0.76 HC-$18.40 PLUS POSTAGE
Directed toward the practitioner, the book is a compilation by 18 knowledgeable, experienced authors of some of the recent literature and current practices in the field relating to aging. The book consists of seven parts: (1) The Older Adult as Learner, (2) The Role of Education in an Aging Society, (3) The Aging Individual and the Changing Nature of Society and Education, (4) Informal Approaches in Education for Aging, (5) Preparation for Critical Phases of Life in Aging, (6) Governmental Resources in Education for Aging, and (7) The Scope of the Field and Perspectives for the Future. Part two focuses on the role of gerontology in adult education as well as the political implications of education for aging; part three outlines available educational opportunities for the elderly and sets forth concepts and a framework for incorporating education for aging within elementary/secondary school systems. Informal educational approaches are presented in four chapters that describe community programs, non-traditional approaches in practice, preretirement education/planning, and the challenge of leisure in later maturity. Another five chapters, part five, discuss aging as related to: community health services, physical fitness education, nutritional education, sexuality, and education of long-term health care administrators. References follow each chapter. (EA)
Descriptors: Administrator Education/ *Adult Learning/ Changing Attitudes/ Community Health Services/ Community Programs/ *Continuous Learning/ *Educational Innovation/ Educational Opportunities/ *Educational Strategies/ Geriatrics / Leisure Time/ Nutrition Instruction/ *Older Adults/ Physical Fitness/ Political Influences/ Retirement/ Sexuality/ State Federal Support

ED081984# CE000217
A Program to Prepare Older Workers for Retirement and Interest Community Groups in Pre-Retirement Planning. First Annual Report. June 1, 1967 to August 31, 1968.
Drake Univ., Des Moines, Iowa. Pre-Retirement Planning Center.
31 Aug 68 202p.
Sponsoring Agency: Department of Health, Education, and Welfare, Washington, D.C. Commission on Aging.; Manpower Administration (DOL), Washington, D.C. Office of Research and Development.
Report No.: DLMA-82-17-66-61-1
Available from: National Technical Information Service, Springfield, Va. 22151 (PB-199 495, MF $1.45, HC $3.00)
Document Not Available from EDRS.
The purpose of this program is to develop methods for aiding older employed workers in preparing for retirement and possible retirement employment. The Drake Project jointly funded by the Administration on the Aging is conducting sessions in-plant through release time arrangement often on cooperation with the recognized bargaining agent. Other sessions are held at the University with participants from the community at large. The goal of the project is to help prepare the worker approaching retirement to begin gradually to replace the normal work role with a satisfactory retirement role. Participants are divided into 5 groups (Industrial, Business, Governmental, Professional and Community at Large). (Author)
Descriptors: Administrative Personnel/ Community Programs/ Employment/ Government Employees/ Industrial Personnel/ Labor Unions/ *Manpower Utilization/ *Older Adults/ Professional Personnel/ *Retirement/ *Work Attitudes
Identifiers: *Preretirement

ED081977# CE000209
A Program to Prepare Older Workers for Retirement and Interest Community Groups in Pre-Retirement Planning. Second Annual Report, September 1, 1968 to August 31, 1969. Drake University Pre-Retirement Planning Center.
Drake Univ., Des Moines, Iowa. Pre-Retirement Planning Center.
Aug 69 228p.; For First Annual Report, see CE 000217
Sponsoring Agency: Department of Health, Education, and Welfare, Washington, D.C. Commission on Aging.; Manpower Administration (DOL), Washington, D.C. Office of Research and Development.
Report No.: DLMA-82-17-67-57-1
Available from: National Technical Information Service, Springfield, Va. 22151 (PB-199 526, MF $1.45, HC $3.00)
Document Not Available from EDRS.
The project was designed to develop, and evaluate the effectiveness of a pre-retirement planning program. The project, in its second year of operation, has had 575 participants who attended a seven-week series of programs covering the topics of employment after retirement, estate planning, company fringe benefits, continuing education, investments, Social Security-Medicare, and psychological aspects of retirement. Individual pre-retirement counseling was also provided. The changing attitudes and the levels of participation of the clients are examined through the use of questions designed at the project and by other sources. (Author)
Descriptors: Community Organizations/ Estate Planning/ *Older Adults/ *Planning/ *Program Content/ Program Design/ *Program Development/ Program Evaluation/ *Retirement
Identifiers: *Preretirement

ED080728# VT021055
An Identification of Differences Between Participating and Non-Participating Automobile Workers in A Preretirement Education Program.
Cokinda, Robert Milton
72 316p.; Ph.D. Dissertation, Wayne State University, Detroit, Mich.
Available from: University Microfilms, A Xerox Company, 300 North Zeeb Rd., Ann Arbor, MI 48103 (Order No. 73-12494, MF $4.00, Xerography $10.00)
Document Not Available from EDRS.
This study was prompted by an interest in the outcomes of automobile workers as they changed from the role of workers to retirees some having participated in voluntary company sponsored preretirement education programs and other deciding not to participate. More specifically, an attempt was made to identify differences between participants and nonparticipants in relation to their attitudes and characteristics, reasons for participating, and significant others influencing their decisions. Samples were selected from a list of employees eligible for retirement who had been invited by letter to attend the preretirement program. All 284 who chose to participate were used as the participant sample, and a random sample of 496 names was selected from a master list of those invited. Useable replies were received from 244 participants and 222 nonparticipants. Findings revealed that there are many differential personal characteristics, situational factors, and attitudes among active company employees eligible for retirement, and these differences motivate them toward participation or nonparticipation in preretirement education programs. These variables therefore have utility as a basis for suggesting possible modifications in present preretirement education programs. (Author/SN)
Descriptors: Doctoral Theses/ *Educational Programs/ *Employee Attitudes/ Employment/ *Individual Differences/ *Participant Characteristics/ Participant Involvement/ Participation/ *Retirement/ Statistical Analysis
Identifiers: *Automobile Workers/ Preretirement Education Programs

ED059483 AC012383
Comprehensive Bibliography on Educational Gerontology. Parts 1-20.
Institute of Gerontology, Ann Arbor, Mich.
Aug 71 155p.
EDRS Price MF-$0.76 HC-$8.24 PLUS POSTAGE
A compilation of works on educational gerontology is presented. This bibliography is divided into 20 sections: (1) General References: Education for Older People, (2) Educational Programs for Older People, (3) Multipurpose Senior Centers, (4) Recreation for Older People, (5) Preretirement Education, (6) Consumer Education for Older People, (7) Mass Media in Education for Older People, (8) Bibliographies on Education for the Aging, (9) Materials for Old People, (10) Nutrition, (11) Volunteers, (12) Intelligence in Old Age, (13) Learning in Old Age, (14) Teaching Old People, (15) General References: Training, (16) Graduate Training, (17) Training at the Baccalaureate Level, (18) Sub-Professional Training, (19) Inservice Training, and (20) Retraining Older Workers. (CK)
Descriptors: *Bibliographies/ College Students/ Consumer Education/ *Educational Facilities/ *Educational Programs/ Graduate Study/ Inservice Education/ Instructional Materials/ Intelligence Level/ Learning Activities/ Mass Media/ Nutrition / *Older Adults/ Recreational Programs/ Retirement/ Retraining / *Senior Citizens/ Subprofessionals/ Teaching Techniques/ Volunteers

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ED058541 AC012254
1971 White House Conference on Aging. A Report to the Delegates from the Conference Sections and Special Concerns Sessions.
White House Conference on Aging, Washington, D.C.
71 162p.
EDRS Price MF-$0.76 HC-$8.24 PLUS POSTAGE
The two parts of this document contain reports relating to the normal concerns as well as the special concerns of the older adult population. In Part I, the reports discuss: Education; Employment and Retirement; Physical and Mental Health; Housing; Income; Nutrition; Retirement Roles and Activities; Spiritual well-Being; Transportation; Facilities, Programs and Services; Government and Non-Government Organization; Planning; Research and Demonstration; and Training. Part II contains reports related to the following: Aging and Blindness; Aging and Aged Blacks; Asian American Elderly; The Elderly Consumer; Mental Health Care Strategies and Aging; The Older Family; Homemaker/ Home Health Aide Services; The Elderly Indian; Legal Aid and the Urban Aged; Long-Term Care for Older People; The Poor Elderly; Rural Older People; Spanish Speaking Elderly (Spanish); Spanish Speaking Elderly; The Religious Community and the Aged; Physical and Vocational Rehabilitation; Volunteer Roles for Older People; and Youth and Age. The role that education plays in the part of the older adult is presented in relation to the following: bilingual and ethnic concerns; expansion of educational programs; funding programs; educational policy; increasing influence of older persons; materials, methods and curriculum; mass media; preretirement; professional preparation; and the status of the Administration on Aging. (DB)
Descriptors: Adult Education Programs/ Conferences/ Disadvantaged Groups/ *Educational Needs/ Ethnic Groups/ *Instructional Staff/ *Older Adults/ *Participant Involvement/ *Professional Personnel/ Special Health Problems
Identifiers: Administration on Aging

ED043816 AC008383
Drake University Pre-Retirement Planning Center. Annual Report, September 1, 1968 to August 31, 1969.
Paul, E. J.; And Others
Drake Univ., Des Moines, Iowa.
Aug 70 227p.
Sponsoring Agency: Department of Health, Education, and Welfare, Washington, D.C. Commission on Aging.
Report No.: AA-4-68-043-02
EDRS Price MF-$0.76 HC-$12.05 PLUS POSTAGE
The major task of Drake University Pre-Retirement Center for the fiscal year 1968-69 continued to be the demonstration and evaluation of different methods of involving workers in retirement preparation activities. Recruitment was from three primary groups: business, government employees, and the community at large. The center also helped the community of Mason City, Iowa, to establish three groups: one from the community at large (28 participatns); one, industrial (15 blue collar); and the third, professional (31 teachers). Three studies were also conducted by center personnel. In one, based on 214 subjects, the age level at which preretirement planning results in greatest attitude and adjustment change was determined, using the Dugger Scale. The second, with 145 participants, concerned itself with retirement planning activities and attitude change resulting from participation in preretirement planning programs. The third, involving 368 subjects, determined the influence of certain personality characteristics in likelihood of change and what changes had occurred in expressed concerns, involvement, and attitudes. (PT)
Descriptors: Age Differences/ Attitude Tests/ Business/ Changing Attitudes/ Evaluation/ Government Employees/ Industrial Personnel/ Measurement Techniques/ Middle Aged/ *Motivation Techniques/ Older Adults/ *Participation/ *Personal Adjustment/ *Planning/ Program Planning/ *Retirement / Teachers/ University Extension
Identifiers: Drake University/ Dugger Scale

ED042996 AC008636
Preretirement Counseling, Retirement Adjustment, and the Older Employee.
Greene, Mark R.; And Others
Oregon Univ., Eugene. Coll. of Business Administration.
Oct 69 336p.
EDRS Price MF-$0.76 HC-$17.13 PLUS POSTAGE
This study analyzed relationships between successful adjustment to retirement, preretirement counseling, and the psychological, economic, and other background characteristics of individual employees. A preliminary study in the western states showed no small companies, and relatively few other, with preretirement counseling programs of any consequence. Eight large and medium sized companies, four with and four lacking such programs, constituted the sample; 648 retirees and employees were interviewed. Most retirees (75%) accepted retirement as such, but many retirees and employees opposed mandatory retirement policies. Finances, health, activities, retirement attitudes, previous retirement planning, morale, and job skill level were significantly related to good adjustment; resistance to retirement correlated with income, activities, financial planning, health, enjoyment of activities, retirement attitudes, and marital status. Activities, health, and financial planning were especially germane. It was concluded that preretirement counseling programs aided adjustment and weakened older employees' resistance to retirement, as well as improving morale and job related attitudes. (The report includes 331 tables, methodology of the study, and questionnaire.) (LY)
Descriptors: *Adjustment (to Environment)/ *Adult Counseling / Analysis of Variance/ *Attitudes/ Evaluation/ Financial Support/ Geographic Location/ Income/ *Industrial Personnel/ Marital Status/ Organization Size (Groups)/ Participation/ Physical Health/ Prediction/ Questionnaires/ *Retirement/ Statistical Data/ Work Attitudes

ED027498# AC004199
A Communication Patterns Study of Retired Faculty from Selected Missouri Institutions of Higher Learning.
Balanoff, Neal
Northwestern Univ., Evanston, Ill.
66 253p.; Ph. D. Thesis.
Available from: University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Michigan 48106 (Order No. 67-4205, MF $3.30, Xerography $11.50).
Document Not Available from EDRS.
This study investigated communication patterns of retired faculty of Missouri colleges and universities. Questionnaires were completed by 75 persons (50 men and 25 women), of whom 50 (33 men and 17 women) were interviewed. Findings included the following: face to face communication was the favorite mode of communication, followed by telephone, books, television, radio, newspapers, lectures, and phonograph records; although radio was not high on the preferred list, retired faculty had established more fixed patterns of use for this medium than for any of the others studied; newspapers were the primary source of news; aside from conversation, respondents found more satisfaction in print media than in radio, television, or motion pictures. Other areas of discussion included sex, age, health, income, preretirement activities, community involvement, field of instruction, rank, degrees, other employment, home environment, and relative satisfaction with various media before and after retirement. (author/ly)
Descriptors: Books/ *College Faculty/ *Communication (Thought Transfer)/ Doctoral Theses/ Films/ Individual Differences/ Interpersonal Relationship/ *Mass Media/ Newspapers/ Nonverbal Communication/ *Older Adults/ Participation/ Radio/ *Retirement/ Surveys/ Television/ Verbal Communication
Identifiers: *Missouri

ED024908 24 AC003493
Preretirement Education for Hourly-Rated Employees. Final Report.
Hunter, Woodrow W.
Michigan Univ., Ann Arbor. Div. of Gerontology.
Jun 68 127p.
Report No.: CRP-1422 Bureau No.: BR-5-0024
Contract No.: OEC-2-10-047
EDRS Price MF-$0.76 HC-$6.97 PLUS POSTAGE
To develop and test preretirement educational materials and methods for hourly rated workers and to determine the immediate effects of participation by these workers and their wives in a group discussion preretirement education program, a study was undertaken with 88 automobile workers (aged 60 or more) and 54 wives as volunteers. Six types of materials were used for group study: essays, case histories, a retirement checklist, short films, still pictures, and a discussion leader's manual. After 17 measures of change among experimental and control workers, the discussion program did not seem to have changed workers' attitudes toward life in general, retirement, health, or income, but it encouraged participants to take preparatory retirement steps. Wives in the experimental group completed the program with significantly more favorable scores on health self-appraisal and retirement income, while wives in the control group had a higher score on present income attitudes. Married participants and those with incomes over $7000 achieved higher mean change scores on indexes measuring self satisfaction and retirement attitudes. (Appendixes include tables and 17 indexes. References are included.) (jf)
Descriptors: *Adjustment Problems/ *Adult Education Programs / Assembly (Manufacturing)/ Bibliographies/ Changing Attitudes / *Group Discussion/ Income/ Instructional Materials/ Laborers / Marital Status/ Mental Health/ Participant Characteristics/ *Research/ *Retirement/ Statistical Data
Identifiers: *Detroit

DIALOG File1: ERIC 66-APR78 (Item 33 of 36) User1210 2may78

ED024869 AC002912
A Longitudinal Study of Preretirement Education.
Hunter, Woodrow W.
Michigan Univ., Ann Arbor. Div. of Gerontology.
68 128p.
Sponsoring Agency: Welfare Administration, Washington, D.C. (DHEW).
Report No.: Proj-151
EDRS Price MF-$0.76 HC-$6.97 PLUS POSTAGE
In a longitudinal study of preretirement education, one of two groups had a group discussion program for 10 weekly sessions. Volunteer participants were male, hourly-rated workers, 60-68 years old, employed in the Detroit area automobile assembly plants. Discussion centered on work and retirement, money management, physical and mental health, living arrangements, relationships with family and friends, legal issues, free time, and community programs. Data were collected by interviews with all subjects before retirement, six to 12 months, and 18 to 24 months after retirement. Results showed that the preretirement education significantly reduced retirement dissatisfaction and health worries, and encouraged participation in activities with family and friends. With both experimental and control groups, there was an increase in the husbands' power in family decision making after retirement. Certain tentative findings, such as the suggestion that the program was more effective with well educated whites, indicate that further study is needed. (jf)
Descriptors: *Adjustment Problems/ *Adult Education Programs / Bibliographies/ Changing Attitudes/ Decision Making/ Family Relationship/ *Group Discussion/ Health/ Laborers/ Leisure Time/ Money Management/ *Research/ *Retirement/ Social Relations/ Work Attitudes
Identifiers: *Detroit

ED022979 AC000625
A Cross-National Appraisal of Preretirement Education.
Hunter, Woodrow W.
Michigan Univ., Ann Arbor. Div. of Gerontology.; Michigan Univ., Ann Arbor. Inst. of Labor and Industrial Relations.
65 104p.
Report No.: CRP-1422
EDRS Price MF-$0.76 HC-$5.70 PLUS POSTAGE
A comparison was made of attitudes toward retirement and readiness for it among hourly-rated older automobile workers in the United States and those in Great Britain. Tables show both similarities and differences in their general characteristics, permitting tentative comparisons. Americans viewed retirement more positively, found their jobs more difficult or unpleasant, expected better retirement income, had more encouragement from employers and unions to retire early, and were more likely to receive preretirement education. (The question remains whether such education produces a positive attitude or the reverse.) Programs in the two countries were compared using a recent United States survey and by means of visits and questionnaires in Great Britain. It was concluded that American programs would benefit from broader public support to provide a variety of participants and community groups, that enrollments in both countries are small and tend to come shortly before retirement, and that more experimentation with course content and methodology is needed. (ly)
Descriptors: *Adult Education Programs/ Attitudes/ *Comparative Education/ Course Content/ Individual Characteristics/ Motivation/ Program Administration/ Research/ *Retirement/ *Skilled Workers/ Statistical Data/ Teaching Methods
Identifiers: Great Britain/ United States

ED019564 AC001936
EDUCATION FOR AGING. CURRENT INFORMATION SOURCES, NUMBER 14.
Syracuse Univ., N.Y. ERIC Clearinghouse on Adult Education.
FEB68 20P.
EDRS PRICE MF-$0.76 HC-$1.58 PLUS POSTAGE
THIS BIBLIOGRAPHY OF RECENT (1964-67) ANNOTATIONS AND ABSTRACTS IS DIVIDED INTO SECTIONS RELATING TO THE CHARACTERISTICS AND LEARNING ABILITIES OF OLDER ADULTS, TRAINING PROGRAMS, AND RETIREMENT AND PRERETIREMENT EDUCATION. SUCH TOPICS AND AREAS OF CONCERN AS STABILITY AND CHANGE IN ADULT CHARACTERISTICS (INCLUDING CHANGES IN GOALS), EDUCATIONAL PHILOSOPHY, TESTING AND TEST CONSTRUCTION, MANPOWER DEVELOPMENT, LABOR MANAGEMENT COOPERATION IN PRERETIREMENT EDUCATION, VOCATIONAL GUIDANCE AND CAREER PLANNING, USE OF CORRESPONDENCE STUDY AND OF EDUCATIONAL FILMS AND TELEVISION, THE PROBLEMS OF OLDER SALESMEN, AND COMPARATIVE EDUCATION IN THE UNITED STATES, GREAT BRITAIN, AND EUROPE ARE REPRESENTED. ALSO LISTED ARE OTHER ERIC CLEARINGHOUSE ON ADULT EDUCATION PUBLICATIONS, AND MEMBERS OF THE NATIONAL ADVISORY BOARD. (LY)
Descriptors: Adult Characteristics/ Adult Learning/ *Age/ Age Differences/ *Annotated Bibliographies/ Cooperative Programs/ Correspondence Study/ Education/ Films/ Guidance Counseling/ Industrial Training/ *Intelligence/ Labor Unions/ Leisure Time/ *Retirement/ Salesmanship/ Testing/ *Vocational Retraining
Identifiers: EUROPE/ GREAT BRITAIN/ OLDER WORKERS/ UNITED STATES

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DIALOG File1: ERIC 66-APR78 (Item 36 of 36) User1210 2may78

ED015379 AC001748
GUIDELINES TO THE AFL-CIO COMMUNITY SERVICES PROGRAM.
BEIRNE, JOSEPH A.
American Federation of Labor - Congress of Industrial Organizations, Washington, D.C.
MAR66 21P.
EDRS PRICE MF-$0.76 HC-$1.58 PLUS POSTAGE
BACKGROUND MATERIALS ON THE AFL-CIO PROGRAM OF COMMUNITY SERVICES OUTLINE THE ORIGINS AND DEVELOPMENT OF THE PROGRAM, PARTICULARLY SINCE THE FORMATION OF THE AFL-CIO IN 1955. IN ADDITION TO LISTING KEY POLICY AND POSITION STATEMENTS STIPULATING THE SCOPE AND THE ADMINISTRATIVE ORGANIZATION OF THE PROGRAM, THIS OUTLINE DESCRIBES SUCH MAJOR ACTIVITIES AND CONCERNS AS UNION MEMBER COUNSELING ON THE USE OF COMMUNITY HEALTH AND WELFARE SERVICES AND FACILITIES, HEALTH AND WELFARE INSTITUTES AND CONFERENCES, PRERETIREMENT EDUCATION, CONSUMER EDUCATION, PARTICIPATION IN FUND RAISING, SERVICES TO THE UNEMPLOYED, STRIKE ASSISTANCE, BLOOD BANKS, COMMUNITY HEALTH EDUCATION, DISASTER SERVICES, AND SCHOLARSHIP AID. (LY)
Descriptors: Community Relations/ *Community Services/ Consumer Economics/ *Cooperative Programs/ Counseling/ Health Education/ Labor Education/ *Labor Unions/ Private Financial Support/ Retirement/ Scholarship Funds/ Special Services/ Unemployment/ *Union Members/ Welfare Services
Identifiers: AFL CIO/ DEPARTMENT OF COMMUNITY SERVICES

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  3     0 PRE-RETIREMENT
  4    36 PRERETIREMENT
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  7     0 PRE-RETIREMENT
  8     6 PRERETIREMENT
  9     0 PRE-TIREMENT
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 11    18 PRE(W)RETIREMENT
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803271 ARTICLE OATS ORDER#: EJ290 1 REFS
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KIEFFER W
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784035 MEETING AB OATS ORDER#: DX504 0 REFS
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GERONTOLOGIST, V17, N5, P41-41, 1977

766586 BOOK REV OATS ORDER#: DS132 1 REFS
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756206 BOOK REV OATS ORDER#: DN354 1 REFS
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FERENCE TP (CAREER MANAGEMENT SY, 1976)

730193 ARTICLE OATS ORDER#: DD988 0 REFS
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715218 ARTICLE OATS ORDER#: CY664 64 REFS
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690618 ARTICLE OATS ORDER#: CK775 7 REFS
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690617 ARTICLE OATS ORDER#: CK775 5 REFS
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673741 ARTICLE OATS ORDER#: CE412 7 REFS
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614671 BRIEF COMM OATS ORDER#: BJ365 1 REFS
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SCHUCHAT T
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563072 MEETING AB OATS ORDER#: AR182 0 REFS
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BOYACK VL; TIBERI DM
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552355 ARTICLE OATS ORDER#: AP348 20 REFS
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JOURNAL OF GERONTOLOGY, V30, N5, P595-600, 1975

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510497 ARTICLE OATS ORDER#: V9268 5 REFS
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CITY UNIV NEW YORK,BARUCH COLL,17 LEXINGTON AVE/NEW YORK//NY/10010; SCHERING CORP/KENILWORTH//NJ/
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469912 ARTICLE OATS ORDER#: U9246 7 REFS
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400438 ARTICLE OATS ORDER#: R7689 35 REFS
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281469 ARTICLE OATS ORDER#: R1031 17 REFS
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255066 ARTICLE OATS ORDER#: L7628 0 REFS
CATHOLIC RELIGIOUS ORDERS AND AGING PROCESS - LEADERSHIP TRAINING FOR PRE-RETIREMENT PROGRAMS IN RELIGIOUS COMMUNITIES (EN)
HUNTER WW
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253707 BRIEF COMM OATS ORDER#: L1969 12 REFS
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81

248524 ARTICLE OATS ORDER#: Z0883 8 REFS
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O'ROURKE JF; FRIEDMAN HL
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INDUSTRIAL GERONTOLOGY, V1972, N15, P63-70, 1972

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217264 ARTICLE OATS ORDER#: P9997 25 REFS
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DIALOG File6: NTIS 64-(ISS09)78 (Copr. N.T.I.S.) (Item 1 of 8) User1210 2may78

The Pre-Retirement Years: Five Years in the Work Lives of Middle-Aged Men. Volume 4

Ohio State Univ., Columbus. Center for Human Resource Research.*Manpower Administration, Washington, D.C. Office of Research and Development.
AUTHOR: Parnes, Herbert S.; Adams, Arvil V.; Andrisani, Paul; Kohen, Andrew I.; Nestel, Gilbert
C4514K2 Fld: 05I, 70D, 92C GRAI7511
Dec 74 425p
Contract: DL-82-39-72-21
Monitor: DLMA/NLS-82-39-72-21
See also PB-212 637.

Abstract: The volume examines a number of facets of the labor market experience and behavior of middle-aged men. It is based on a unique set of longitudinal data collected by personal interviews with the same sample of men in 1966, 1967, 1969 and 1971. Only selected aspects of the work lives of middle-aged men are covered in this volume, though each topic is subjected to intensive analysis. The topics studied are: (1) antecedents and consequences of participation in formal occupational training programs, (2) the causes and consequences of employer changing, (3) the determinants of and returns to occupational mobility, (4) the expectation and realization of early retirement, and (5) the relationship between locus of control and labor market experience. The volume is based mainly on multivariate statistical methods, but includes extensive appendixes containing data which describe gross longitudinal change over the five-year period.

Descriptors: *Employment, *Males, Attitudes, Earnings, Economic analysis, Economic conditions, Education, Manpower, Fringe benefits, Government employees, Government policies, Industrial training, Job satisfaction, Management training, Mobility, Motivation, Negroes, Obsolescence, Productivity, Statistical samples, Unemployment, Unionization, Unskilled workers, Work sampling, Psychological tests, Retirement, Skilled workers, Socioeconomic status, Specialized training, Upgrading

Identifiers: NTISLABRDU

PB-239 886/5ST NTIS Prices: PC A18/MF A01

The Pre-Retirement Years: A Longitudinal Study of the Labor Market Experience of Men. Volume III

Ohio State Univ., Columbus. Center for Human Resource Research.

Interim rept. 1967-69
AUTHOR: Parnes, Herbert S.; Nestel, Gilbert; Andrisani, Paul

85

C0054E1 Fld: 5I, 70D, 92C GRAI7301
Aug 72 152p*
Contract: DL-81-37-70-18
Monitor: DLMA-81-37-70-18-3
See also Volume 2, PB-192 671.

Abstract: A national probability sample of 5,000 men 45 to 59 years of age was interviewed for the first time in mid-1966 and subsequently in 1967, 1969, and 1971. Volume III examines changes between 1966 and 1969 in the personal and family characteristics of the respondents in their labor force and employment status, and in the jobs they held. The extent of job change and the characteristics associated with mobility are examined. A cross-sectional analysis of variation in hourly rate of pay as of the 1969 survey is presented, as well as a longitudinal analysis of change in rate of pay between 1967 and 1969. The extent of collective bargaining coverage in 1969 and the factors associated with union membership are examined. All of the tabular data on which the analyses are based are stratified by race. (Author)

Descriptors: (*Employment, *Males), Job analysis, Job satisfaction, Negroes, Unionization, Manpower utilization, Retirement, Unemployment, Job rotation

PB-212 637/3 NTIS Prices: PC A08/MF A01

86

Planning for Retirement. How to Prepare and Present a Pre-Retirement Program

Massachusetts Univ., Amherst. Labor Relations and Research Center.
A4541E2 Fld: 5I, 56M GRAI7214
1970 8p
Monitor: SRS-AA-5030

Abstract: The project was developed to demonstrate and evaluate the relative impact of two types of preretirement educational programs on the attitudes of participants. Discussion groups receiving retirement literature were compared with other groups receiving the literature but not participating in discussions. The literature contained information dealing with the main problems of retirees and the counseling program involved in the use of speakers, discussion leaders, visual aids and audience participation. Special attention was given to recruitment and sustaining interest, and an individualized approach was stressed. A low cost program for providing preretirement counseling was developed. The report provides a workable program for preretirement counseling to cover the major problems faced by retirees and would be of use to unions, the military and other major groups of workers.

Descriptors: (*Retirement, Planning), Counseling, Social welfare, Project planning, Problem solving, Cost analysis, Correlations, Methodology

PB-209 230 NTIS Prices: PC A02/MF A01

An Inter-Union Pre-Retirement Training Program. Results of a Demonstration Project

Massachusetts Univ., Amherst. Labor Relations and Research Center.

Final rept. 1 Oct 68-30 Sep 70
AUTHOR: Friedman, H. L.; Moreau, B. R.; O'Rourke, John; Clarke, Alfred A. Jr
A4541D4 Fld: 5I, 56N, 56E GRAI7214
1970 95p
Monitor: SRS-AA-5030-A

Abstract: The purpose of the project was to demonstrate the possibilities and needs of preretirement education among a group of 62 to 64 year old preretirees whose commonality was that they were all members of trade unions in a given geographical area. It was hypothesized that using central labor bodies as recruiting agents would overcome the reluctance of preretirees to attend retirement classes. The project demonstrated the feasibility of this approach. The procedures and results appear useful in establishing other retirement and preretirement programs.

Descriptors: (*Retirement, Project planning), (*Labor unions, Retirement), Specialized training, Attitudes, Adjustment(Psychology), Feasibility, Effectiveness

Identifiers: Preretirement training programs, Demonstration projects

PB-209 194 NTIS Prices: PC A05/MF A01

A Program to Prepare Older Workers for Retirement and Interest Community Groups in Pre-Retirement Planning

Drake Univ., Des Moines, Iowa. Pre-Retirement Planning Center.

Annual rept. 1 Sep 68-31 Aug 69.
A2322D2 Fld: 5I, 7JE GRAI7114
31 Aug 69 228p
Contract: DL-82-17-67-57, AA-4-67-043-01
Monitor: DLMA-82-17-67-57-1
Report on Plan now for an Active Retirement. Society Needs You. See also PB-199 495.

Abstract: The project was designed to develop, and evaluate the effectiveness of a pre-retirement planning program. The project, in its second year of operation, has had 575 participants who attended a seven-week series of programs covering the topics of employment after retirement, estate planning, company fringe benefits, continuing education, investments, social security-medicare, and psychological aspects of retirement. Individual pre-retirement counseling was also provided. The changing attitudes and the levels of participation of the clients are examined through the use of questions designed at the project and by other sources. (DLMA abstract)

Descriptors: (*Retirement, Planning), (*Manpower, Roles(Behavior)), Surveys, Attitudes, Education, Information systems, Social psychology, Methodology

Identifiers: *Older workers, *Preretirement programs, *Role changing

PB-199 526 NTIS Prices: PC A11/MF A01

A Program to Prepare Older Workers for Retirement and Interest Community Groups in Pre-Retirement Planning

Drake Univ., Des Moines, Iowa. Pre-Retirement Planning Center.

Annual rept. no. 1, 1Jun 67-31 Aug 68.
A2321H3 Fld: 5I, 70E GRAI7114
31 Aug 68 202p
Contract: DL-82-17-66-61, AA-4-67-043-01
Monitor: DLMA-82-17-66-61-1
See alo PB-199 526.

Abstract: The purpose of this program is to develop methods for aiding older employed workers in preparing for retirement and possible retirement employment. The Drake Project jointly funded by the Administration on the Aging is conducting sessions in-plant through release time arrangement often in co-operation with the recognized bargaining agent. Other sessions are held at the University with participants from the community at large. The goal of the project is to help prepare the worker approaching retirement to begin gradually to replace the normal work role with a satisfactory retirement role. Participants are divided into 5 groups (industrial, business, governmental, professional and community at large). (DLMA abstract)

Descriptors: (*Retirement, Planning), (*Personnel management, Retirement), Employment, Manpower utilization, Industries, Commerce, Government employees, Professional personnel, Community development

Identifiers: *Older workers, *Pre retirement programs

PB-199 495 NTIS Prices: PC A10/MF A01

THE PRE-RETIREMENT YEARS: VOLUME 2: A LONGITUDINAL STUDY OF LABOR MARKET EXPERIENCE OF MEN

Ohio State Univ., Columbus. Center for Human Resource Research.
AUTHOR: Parnes, Herbert S.; Egge, Karl; Kohen, Andrew I.; Schmidt, Ronald M.
A0631L1 Fld: 5I, 70E USGRDR7017
Jan 70 122p
See also Volume 1, PB-180 530.

Abstract: The volume is a brief progress report on a longitudinal study of the labor market experience of middle-aged men. The studies views the experience and behavior of individuals in the labor market as resulting from an interaction between the characteristics of the environment and a variety of demographic, economic, social, and attitudinal characteristics of the individual. The study seeks to identify those characteristics that appear to be most important in explaining variations in several important facets of labor market experience: labor force participation, unemployment experience, and various types of labor mobility. (Author)

Descriptors: (*Employment, Males), Economics, Labor, Attitudes, Statistical data, Personnel management

PB-192 671 CFSTI Prices: HC A06/MF A01

THE PRE-RETIREMENT YEARS: VOL I. A LONGITUDINAL STUDY OF THE LABOR MARKET EXPERIENCE OF THE COHORT OF MEN 45-59 YEARS OF AGE

Ohio State Univ., Columbus. Center for Human Resource Research.
AUTHOR: Parnes, Herbert S.; Fleisher, Belton M.; Miljus, Robert C.; Spitz, Ruth S.
5502A1 Fld: 5I USGRDR6904
Oct 68 303p*

Abstract: In early 1965, the Center for Human Resource Research, under a contract with the United States Department of Labor, began the planning of longitudinal studies of the labor market experience of four subsets of the United States population: men 45-59 years of age, women 30-44 years of age, and young men and women 14-24 years of age. The present volume is the initial report on the older group of men. Each study seeks to identify those characteristics that appear to be most important in explaining variations in several important facets of labor market experience: labor force participation, unemployment experience, and various types of labor mobility. From one point of view, the general objective of all of the studies might be defined as follows: to uncover the complex of economic, social, and psychological factors that are associated with successful adaptation by individuals to the labor market. (Author)

Descriptors: (*Employment, Males), Economics, Sociology, Attitudes, Labor, Population, Statistical data, Personnel management

PB-180 530 CFSTI Prices: PC A14/MF A01

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DIALOG File11: PSYCH ABS 67-MAR78 (Copr. Am. Psych. Assoc.) (Item 1 of 32) User1210 2may78

DOC YEAR: 1977 VOL NO: 58 ABSTRACT NO: 12534
Andragogy and the aging adult learner.
Meyer, Sheldon L.
U Oregon Ctr for Gerontology
Educational Gerontology 1977 Apr-Jun Vol 2(2) 115-122
Identifies the basic concepts and structures of pedagogy and andragogy as teaching-learning strategies for aging adults. Andragogy is discussed as a relevant participatory adult education technique. The applicability of andragogy as a preretirement education process is explained, and the task-oriented training model of preretirement education is discussed.
LANGUAGE: Engl CLASSIFICATION: 35
SUBJECT TERMS: AGED, ADULTS, RETIREMENT, ADULT EDUCATION; 01370, 01160, 44470, 01130
INDEX PHRASE: basic concepts & structures of pedagogy & andragogy as teaching-learning strategies & as preretirement education process, aging adults

DOC YEAR: 1977 VOL NO: 57 ABSTRACT NO: 14041
Effects of preretirement planning on the retirement adjustment of military personnel.
Fuller, Robert L.; Redfering, David L.
Sociology of Work & Occupations 1976 Nov Vol 3(4) 479-487
Retired enlisted personnel are more likely than retired officers to find their choice of a 2nd career to be commensurate with their military duties, because officers rarely move into a high civilian managerial position. Consequently, it was hypothesized that adjustment to retirement would be more successfully accomplished by enlisted men than by officers regardless of how well they planned or how long they had been retired. A 3-factor analysis of variance for unequal groups was conducted, using data on 379 officers and 372 enlisted men, to determine the effects of rank, number of years retired, and preretirement planning on retirement adjustment. The effects of all factors and all interactions of factors were found to be nonsignificant with the exception of preretirement planning. Those who planned well adjusted well, regardless of rank or number of years retired.
LANGUAGE: Engl CLASSIFICATION: 36
SUBJECT TERMS: RETIREMENT, COMMISSIONED OFFICERS, ENLISTED MILITARY PERSONNEL, ADJUSTMENT/; 44470, 10470, 17480, 00850
INDEX PHRASE: preretirement planning & rank & number of years retired, retirement adjustment, military officers vs enlisted men

DOC YEAR: 1977 VOL NO: 57 ABSTRACT NO: 05922
Patterns of leisure and adjustment to retirement.
Peppers, Larry G.
Clemson U
Gerontologist 1976 Oct Vol 16(5) 441-446
Studied 206 retired men (median age, 68.8 yrs), most of whom had been owners, managers, or partners in small businesses or farm ventures or lower-level government officials. Even though a wide range of activities (57) was observed, isolate activities were the most prevalent. Eight of the 1st 10 most popular endeavors were isolate-type: watching TV, doing odd jobs at home, reading, sitting and thinking, fishing, walking, gardening, and traveling (alone). Life satisfaction appeared to be influenced by activity type, number of activities, and participation-enjoyment congruence. Supportive of the continuity approach to aging, results have implications for both preretirement counseling and institutional activity programs. (20 ref)
LANGUAGE: Engl CLASSIFICATION: 31
SUBJECT TERMS: LEISURE TIME, INTERPERSONAL INTERACTION, RETIREMENT, HUMAN MALES, EMOTIONAL ADJUSTMENT; 28150, 26250, 44470, 23490, 16760
INDEX PHRASE: leisure activities patterns, adjustment to retirement, retired males

DOC YEAR: 1977 VOL NO: 57 ABSTRACT NO: 02096
The work-satisfaction, retirement-attitude typology: Profile examination.
Goudy, Willis J.; Powers, Edward A.; Keith, Patricia
Iowa State U
Experimental Aging Research 1975 Nov Vol 1(2) 267-279
A new typology of work satisfaction and attitude toward retirement including 4 categories (Type A--positive attitudes toward work and retirement; Type B--work positive, retirement negative; Type C--work negative, retirement positive; and Type D--negative attitudes toward work and retirement) was developed and applied to questionnaire data collected in 1964 from 1,922 males over 50 yrs of age who were either self-employed professionals, salaried professionals, owner-merchants, factory workers, or farmers. Some follow-up data from 1966 and 1974 are also reported. Overall findings suggest that members of some types will be more susceptible to negative consequences of cycle change (work to retirement) than others. Socioeconomic status, age, social participation, health, community, housing, family, work, morale, and longevity data indicate preretirement planning approaches should be developed for those having different work-retirement attitudes.
LANGUAGE: Engl CLASSIFICATION: 36
SUBJECT TERMS: JOB SATISFACTION, RETIREMENT, EMPLOYEE ATTITUDES, ADULTS, AGED, BUSINESS AND INDUSTRIAL PERSONNEL, WHITE COLLAR WORKERS, AGRICULTURAL WORKERS, PERSONNEL/, HUMAN MALES; 27040, 44470, 17020, 01160, 01370, 07120, 56690, 01510, 37980, 23490
INDEX PHRASE: typology of work satisfaction & attitudes toward retirement, analysis of current attitudinal states & prediction of difficulty in retirement transition & suggestions for program areas for retirement facilitation, male self employed vs salaried professionals vs owner-merchants vs factory workers vs farmers over 50 yrs of age

DOC YEAR: 1977 VOL NO: 57 ABSTRACT NO: 00884
To the problem of dynamics of social relations in the age before pension.
Slavik, Milan
U Komenskeho Psychologicky ustav Filozofickej fakulty, Bratislava, Czechoslovakia
Psychologica: Zbornik Filozofickej Fakulty, U. Komenskeho 1973-74 Vol 23-24(12-13) 175-188
Studied the types of social activity engaged in by persons of preretirement age, using tape-recorded interviews. Of the 13 social tasks examined, the 3 having to do with the family (the parent, the old parent, and the husband) and the 3 involving the individual's personal interests (the worker, the spare-time user, and the civic-political worker) were most important. For 7 social tasks activity was the same as it had been 10 yrs before, and for 6 tasks activity had decreased. Data do not support the theory developed by M. E. Cummings and W. E. Henry that a process of disengagement sets in as the individual grows older. Although with even more advanced age persons may become less involved with their environment, it is felt that such behavior would be evoked by external influences, deteriorating health, etc., rather than by "internal" changes of the psyche. (Russian & German summaries)
LANGUAGE: Czec CLASSIFICATION: 28
SUBJECT TERMS: HUMAN DEVELOPMENT/, ADULTS, INTERESTS, SOCIAL INTERACTION, PHYSIOLOGICAL AGING; 23430, 01160, 26080, 48260, 38670
INDEX PHRASE: adult development & aging, family & personal interests & social task activities, preretirement age persons, implications for disengagement theory

DOC YEAR: 1976 VOL NO: 56 ABSTRACT NO: 10598
A longitudinal comparison of attitudes and activity involvement of persons who have completed a pre-retirement planning program.
Bowman, Donald L.
Iowa State U
Dissertation Abstracts International 1974 Nov Vol 35(5-A) 2623
LANGUAGE: Engl CLASSIFICATION: 35
SUBJECT TERMS: LONGITUDINAL STUDIES, RETIREMENT, ATTITUDES/, ADULT EDUCATION; 28760, 44470, 04500, 01130
INDEX PHRASE: pre- vs post retirement planning program, attitudes toward retirement & activity involvement, longitudinal study

DOC YEAR: 1976 VOL NO: 56 ABSTRACT NO: 08641
Retired academics and research activity.
Rowe, Alan R.
Florida Atlantic U
Journal of Gerontology 1976 Jul Vol 31(4) 456-461
Data collected from 207 academics who retired from state and small private colleges and ivy league and large state universities indicate that to varying degrees they continue to engage in professional activities after retirement. Academics who are high on professional visibility appear to be especially likely to continue to engage in research and/or writing. The importance of psychological centrality of preretirement work to postretirement activity is suggested. (27 ref)
LANGUAGE: Engl CLASSIFICATION: 35
SUBJECT TERMS: COLLEGE TEACHERS, RETIREMENT, EXPERIMENTATION/, SCIENTIFIC COMMUNICATION; 10330, 44470, 18650, 45830
INDEX PHRASE: research & writing activity, academics retired from colleges & universities

DOC YEAR: 1976 VOL NO: 56 ABSTRACT NO: 08015
A psychology experiment: Training laboratory for retirement.
Fisher, Donald L.
United States International U
Dissertation Abstracts International 1974 Aug Vol 35(2-B) 1017
LANGUAGE: Engl CLASSIFICATION: 31
SUBJECT TERMS: AGED, RETIREMENT, PERSONALITY PROCESSES/, SELF ACTUALIZATION, SELF ESTEEM, EDUCATION/; 01370, 44470, 37800, 46190, 46260, 16000
INDEX PHRASE: preretirement training laboratory, life styles & self actualization & self esteem, aged retired persons experiencing different degrees of success

DOC YEAR: 1976 VOL NO: 56 ABSTRACT NO: 06877
Are pre-retirement courses really effective? Results of a quasi-experimental approach.
Schneider, H.-D.
U Zurich, Sozialforschungstelle, Switzerland
Zeitschrift fur Gerontologie 1975 Jul-Aug Vol 8(4) 288-294
Asked participants before and after an industrial preretirement course what their fears were pertaining to old age. Data were also obtained from a quasicontrol group of employees who were eligible to participate but who did not attend the course. On only 1 out of 18 items was there a statistically significant difference between the groups. Even when a larger group was used in a cross-sectional analysis, there were only 4 marginally significant differences. The unexpectedly small effects were ascribed to the teaching method used, lectures followed by discussions. It is suggested that institutes place more emphasis on an intensive personal and emotional involvement of the participants, with the information presented within a social context.
LANGUAGE: Germ CLASSIFICATION: 36
SUBJECT TERMS: RETIREMENT, AGED, ANXIETY, TEACHING METHODS; 44470, 01370, 03310, 51740
INDEX PHRASE: industrial preretirement course & teaching methods, fears pertaining to old age

DOC YEAR: 1976 VOL NO: 56 ABSTRACT NO: 03105
A study of the effects of a pre-retirement workshop on the measured level of self-actualization of university civil service employees.
Meyer, Sheldon L.
Oregon State U
Dissertation Abstracts International 1975 Jan Vol 35(7-A) 4163
LANGUAGE: Engl CLASSIFICATION: 36
SUBJECT TERMS: RETIREMENT, OCCUPATIONAL GUIDANCE, SELF ACTUALIZATION, GOVERNMENT PERSONNEL; 44470, 34990, 46190, 21420
INDEX PHRASE: pre-retirement workshop, measured level of self actualization, university civil service employees

DOC YEAR: 1976 VOL NO: 55 ABSTRACT NO: 04660
A study of perceived need fulfillment and life satisfaction before and after retirement.
Wexley, Kenneth N.; McLaughlin, Janet L.; Sterns, Harvey L.
U Akron
Journal of Vocational Behavior 1975 Aug Vol 7(1) 81-87
Examined the perceived need satisfaction, need importance, and overall life satisfaction of 155 managerial and nonmanagerial individuals as a function of 4 periods of proximity to retirement: greater than 48 mo preretirement, 3-48 mo preretirement, 3-48 mo postretirement, and greater than 48 mo postretirement. Preretirees and retirees completed a modified Porter Need Satisfaction Questionnaire and the Life Satisfaction Index. Significant differences were found among proximity to retirement groups in security satisfaction, being-in-the-know satisfaction, self-actualization importance, and autonomy importance. Results suggest that the period of 4-7 yrs before retirement may be a critial time to institute retirement planning programs. Results also suggest that retirement can be a satisfying period of life.
CLASSIFICATION: 31
SUBJECT TERMS: NEED SATISFACTION, RETIREMENT, SELF ACTUALIZATION, MANAGEMENT PERSONNEL, PERSONNEL/, LIFE EXPERIENCES; 33170, 44470, 46190, 29390, 37980, 28355
INDEX PHRASE: proximity to retirement, perceived need satisfaction & need importance & overall life satisfaction, managerial & nonmanagerial individuals prior to retirement

DOC YEAR: 1975 VOL NO: 54 ABSTRACT NO: 06435
Labor force participation of the aged and the social security system in nine countries.
Fisher, Paul
Social Security Administration, Office of Research & Statistics, Washington, DC
Industrial Gerontology 1975 Win Vol 2(1) 1-13
The experience of 9 countries over the last 2 decades indicates that the relationship of the old age benefit to preretirement income and the expectation regarding the purchasing power of the pension in future years are major factors affecting the retirement rate. Countries with mature social security systems have declining labor participation of the aged.
CLASSIFICATION: 17
SUBJECT TERMS: RETIREMENT, AGED, GOVERNMENT PROGRAMS, EMPLOYEE PENSION PLANS, COUNTRIES; 44470, 01370, 21440, 17090, 12195
INDEX PHRASE: social security system, retirement rate, aged in 9 countries

DOC YEAR: 1975 VOL NO: 54 ABSTRACT NO: 04316
Pre-retirement counseling: Characteristics of programs and preferences of retirees.
Kalt, Neil C.; Kohn, Martin H.
Baruch Coll, City U New York
Gerontologist 1975 Apr Vol 15(2) 179-181
Attempted to determine the extent to which major pharmaceutical companies have developed preretirement counseling programs and how people who worked for these companies and who retired feel about preretirement counseling. Questionnaires were returned by 40 companies and 95 retirees. Results indicate that only 9 companies had counseling programs, that many of the companies with programs appeared to be less than fully committed to making their programs work well, and that most of the retirees felt that company-sponsored preretirement counseling programs were needed. While most of the counseling programs covered the topics that most retirees felt were interesting and important, a substantial proportion of programs also ignored many topics that sizable numbers of respondents felt were of real interest and importance to retiring employees. It is pointed out that results are only suggestive: the sample was drawn from only 1 industry.
CLASSIFICATION: 17
SUBJECT TERMS: RETIREMENT, COUNSELING/, OCCUPATIONAL GUIDANCE; 44470, 12080, 34990
INDEX PHRASE: program characteristics & evaluation by employees, preretirement counseling, retirees

DOC YEAR: 1975 VOL NO: 53 ABSTRACT NO: 09318
Older people: Recreology's greatest challenge?
Douse, Len
Journal of Leisurability 1974 Oct Vol 1(4) 18-24
Stresses the life-long nature of the learning process and the need to continue this process into old age. Preretirement education which teaches people to deal effectively with their changed circumstances is suggested, and it is noted that many older people are capable of learning new physical and mental skills.
CLASSIFICATION: 08
SUBJECT TERMS: AGED, EDUCATIONAL PROGRAMS, RETIREMENT, SOCIAL ADJUSTMENT, LEISURE TIME, RECREATION; 01370, 16190, 44470, 48060, 28150, 43400
INDEX PHRASE: preretirement education, learning & adjustment, aged

DOC YEAR: 1975 VOL NO: 53 ABSTRACT NO: 05007
Work after retirement: An investigation into some psychologically relevant variables.
Fillenbaum, Gerda G.; Maddox, George L.
Gerontologist 1974 Oct Vol 14(5, Pt 1) 418-424
Information obtained from a highly select group of 37 healthy, financially secure male university faculty retirees indicates that nearly all worked for pay after retiring. Continued working did not seem to be contingent upon the ready availability of jobs but was related to a personal dislike of retirement, intention to work after that event, active preretirement involvement in work, and the presence of younger friends who were working. It is suggested that work after retirement can be conceptualized as due to a mutually reinforcing interaction among the variables examined. (21 ref)
CLASSIFICATION: 08
SUBJECT TERMS: RETIREMENT, COLLEGE TEACHERS; 44470, 10330
INDEX PHRASE: work following retirement, attitude toward retirement & preretirement involvement & intention to work & presence of working younger friends, healthy & financially secure male university faculty retirees

DOC YEAR: 1974 VOL NO: 52 ABSTRACT NO: 08758
Planning for retirement and anticipatory attitudes towards withdrawal from work.
Jacobson, D.
Tel-Aviv U., Israel
British Journal of Guidance & Counselling 1974 Jan Vol. 2(1) 72-83
Reviews inferences from previous studies on the sociopsychological meaning of the transition from work to retirement. Data are reported on the nature and scope of preretirement planning in a sample of 215 older male and female industrial workers. Particular reference is made to the extent to which planning of leisure activities is related to the worker's attitudes toward retirement, and several intervening variables affecting this relationship are examined. Finally, some theoretical and practical implications for preretirement counseling and training are discussed. It is suggested that preretirement counseling schemes may not be able to compensate for failure to develop life-long habits of using free time constructively or for inadequate financial provision for retirement. (22 ref)
CLASSIFICATION: 17
SUBJECT TERMS: OCCUPATIONAL GUIDANCE, RETIREMENT, LEISURE TIME, EXPECTATIONS; 34990, 44470, 28150, 18460
INDEX PHRASE: preretirement counseling, anticipatory attitudes toward withdrawal from work & use of leisure time, older male & female industrial workers

DOC YEAR: 1974 VOL NO: 52 ABSTRACT NO: 02771
Goals, values, and life evaluations at the preretirement stage.
Thurnher, Majda
U. California, San Francisco
Journal of Gerontology 1974 Jan Vol. 29(1) 85-96
Examined the transition to retirement from the perspectives of goal-setting, value orientations, and life appraisals, factors which were hypothesized to influence adaptation (as measured by ratings of psychological resources, Gottschalk Anxiety scores, and Bradburn Balance scores). Ss were 60 men and women facing retirement and 54 men and women facing the empty-nest stage. Results show that the preretired men were more positive about their concrete goals and life appraisals than the other groups; they showed a decline in instrumental-material and interpersonal-expressive values and an increase in ease-contentment and hedonistic values. Preretired women showed only a decline in interpersonal-expressive values. High instrumental-material and hedonistic values were shown to have negative implications for preretired men. Appraisals of life attainment suggest that, for men, critical life reviews occur at the termination of the occupational career; for women, they occur at the termination of the family cycle. (35 ref)
CLASSIFICATION: 08
SUBJECT TERMS: AGED, RETIREMENT, LIFE EXPERIENCES, PERSONAL VALUES, GOALS; 01370, 44470, 28355, 37690, 21240
INDEX PHRASE: goal-setting & value orientations & life appraisals, transition to retirement

DOC YEAR: 1974 VOL NO: 52 ABSTRACT NO: 01575
The adjustment of aged users of leisure programs.
Goodman, Mortimer; Bley, Nina; Dye, David
Jewish Community Centers Assn., St. Louis, Mo.
American Journal of Orthopsychiatry 1974 Jan Vol. 44(1) 142-149
Describes a program of leisure activities in a senior citizens center and its effects on participants. 103 new applicants (mean age = 70 yrs) were interviewed over a 10-mo period to collect data on demographic, psychological, and social variables, role changes, and adjustment level; 92 completed a follow-up interview 1 yr later. Changes in adjustment, as measured by Lawton's Morale Scale and Havighurst's Life Satisfaction Index 1 yr after membership, were not significant; the applicability of these measures to a study of postretirement adjustment is questioned. Patterns of participation, especially in volunteer groups, were highly consistent with pre-retirement organizational affiliations and previous activities. Women reported more satisfaction for volunteer programs and socialization in general than men; however, there was a greater consistency between men's program expectations and derived satisfaction. The need for continued awareness of individual client characteristics is emphasized, particularly with regard to pre-retirement life-styles.
CLASSIFICATION: 15
SUBJECT TERMS: AGED, LEISURE TIME, RECREATION, SOCIAL ADJUSTMENT, MENTAL HEALTH PROGRAMS; 01370, 28150, 43400, 48060, 30820
INDEX PHRASE: leisure activity programs, adjustment of participants, new applicants in senior citizens center

DOC YEAR: 1974 VOL NO: 51 ABSTRACT NO: 10064
Fatigue-producing factors in industrial work and pre-retirement attitudes.
Jacobson, D.
Tel-Aviv U., Israel
Occupational Psychology 1972 Vol. 46(4) 193-200
Used data from work studies and interviews of 145 male, semiskilled factory workers to test hypotheses which relate preretirement attitudes and self-conceptions to the strain imposed by one's job. Strain was measured by the Rest-Allowance Index, which is a function of the weighted influence of 9 job demands and working conditions generally assumed to produce fatigue. The classification of jobs into ''heavy,'' ''moderate,'' and ''light'' strain on the basis of this index emerged as a useful predictor of willingness to retire, preferred retirement age, self-appraisals of health, and respondents' beliefs regarding the impact of retirement on health. It is suggested that this kind of research on work strain and willingness to retire might produce considerations other than chronological age for determining retirement age. (25 ref)
CLASSIFICATION: 17
SUBJECT TERMS: SKILLED INDUSTRIAL WORKERS, RETIREMENT, EMPLOYEE ATTITUDES, OCCUPATIONAL STRESS; 47700, 44470, 17020, 35060
INDEX PHRASE: heavy vs moderate vs light job strain, willingness to retire, male semiskilled factory workers

DOC YEAR: 1973 VOL NO: 50 ABSTRACT NO: 08799
The family life cycle, primary relationships, and social participation patterns.
Bell, Bill D.
U. Missouri
Gerontologist 1973 Spr Vol. 13(1) 78-81
Studied a controlled sample of 60 male respondents representative of 3 different life-cycle stages. Results indicate no significant relationships between social participation and life-cycle stage. Findings do suggest however, the importance of primary relational ties with respect to participation patterns. (19 ref.)
CLASSIFICATION: 10
SUBJECT TERMS: DEVELOPMENTAL AGE GROUPS, AGED, INTERPERSONAL INTERACTION, SOCIAL INTERACTION, RETIREMENT; 13840, 01370, 26250, 48260, 44470
INDEX PHRASE: late maturity vs. pre-retirement vs. retirement life stage, social participation & primary relationships, 45-54 vs. 55-64 vs. 65-74 yr. old males

DOC YEAR: 1973 VOL NO: 50 ABSTRACT NO: 08778
Perceptions and complexities of friendship in four stages of the adult life cycle.
Weiss, Lawrence; Lowenthal, Marjorie F.
U. California, San Francisco
Proceedings of the 81st Annual Convention of the American Psychological Association, Montreal, Canada 1973 Vol. 8 777-778
Analyzed friendship as a voluntary social relationship using data from 109 female and 107 male Ss (high school seniors, newlyweds, middle-aged couples, and preretirement age Ss). The perceptions and complexities of the configuration or shape of real, personal friends and friendship patterns ideally desired were examined. The analysis focuses on 6 major dimensions of friendship: commonality, reciprocity, role model, compatibility, continuity-proximity, and other factors. Results show a discrepancy between Ss' perceptions of their real friends and what they ideally desire in a friend. Friendship was heterogeneous, and became more complex with age. Life-stage and sex differences are discussed.
CLASSIFICATION: 09
SUBJECT TERMS: FRIENDSHIP, SOCIAL PERCEPTION, HIGH SCHOOL STUDENTS, AGE DIFFERENCES; 20410, 48320, 22930, 01360
INDEX PHRASE: perceptions & dimensions of friendship, high school seniors & newlyweds & middle-aged couples & preretirement aged Ss

DOC YEAR: 1973 VOL NO: 50 ABSTRACT NO: 02013
A social policy framework for pre-retirement planning.
Monk, Abraham
State U. New York, School of Social Policy & Community Services, Buffalo
Industrial Gerontology 1972 Fal No. 15 63-70
Defines limited and comprehensive preretirement programs, with the former being more characteristic of industrial corporations, and the latter being attempted by unions and educational agencies. A social service for preretirement planning is recommended, based either in the Departments of Labor or Health, Education and Welfare. Attention could be given to research, experimentation, and demonstration factors of (a) organized postretirement relations with retirees, (b) differential retirement rates according to economic factors, (c) anticipation and receipt of actual retirement benefits, and (d) adequacy of retirement income over time. It is concluded, from consideration of factors dependent on changing institutional and economic settings, that there can be no universal preretirement planning blueprint at present.
CLASSIFICATION: 17
SUBJECT TERMS: RETIREMENT, SOCIAL PROGRAMS; 44470, 48340
INDEX PHRASE: social policy framework, preretirement planning

DOC YEAR: 1973 VOL NO: 50 ABSTRACT NO: 00696
Retirement and disengagement.
Crawford, Marion P.
U. Bristol, England
Human Relations 1971 Jun Vol. 24(3) 255-278
Reports results of informal semistructured interviews of 99 couples of preretirement age. Results generally support the relationship between retirement and the theory of disengagement. Although the disengagement theory was originally based on a middle-class American sample, it was found in this study of British Ss that the tendency to see retirement in disengagement terms was significantly higher in manual as opposed to nonmanual workers. Also a significantly higher percentage of women saw retirement as disengagement, suggesting that the retirement phenomenon is more of a life-crisis phenomenon than previous studies have indicated. (26 ref.)
CLASSIFICATION: 08
SUBJECT TERMS: EMOTIONAL ADJUSTMENT, RETIREMENT; 16760, 44470
INDEX PHRASE: retirement views in disengagement terms, manual vs. nonmanual workers of preretirement age

DOC YEAR: 1972 VOL NO: 48 ABSTRACT NO: 08879
Factors in retirement adjustment: White-collar/blue-collar experience.
Heidbreder, Elizabeth M.
National Council on the Aging, Washington, D.C.
Industrial Gerontology 1972, Win, No. 12, 69-79
Presents results of a nation-wide survey of early retirees, including both salaried and hourly workers. The data indicate that adjustment to retirement was better among those with (a) more than 1 source of income, (b) retirement income above $300/mo., (c) work (usually parttime) because they wanted to and liked the work, (d) more education, (e) good or excellent health, and (f) preretirement planning.
CLASSIFICATION: 08
SUBJECT TERMS: Adjustment/, Physiological Aging, Money, Occupations/, Educational Background; 00850, 38670, 31870, 35110, 16040
INDEX PHRASE: retirement adjustment, income sources & amount & work & education & health & preretirement planning

DOC YEAR: 1972 VOL NO: 48 ABSTRACT NO: 07027
The aging religious priest.
MacGuigan, J. Elliot
Regis Coll., Willowdale, Ontario, Canada
Gerontologist 1972, Spr, Vol. 12(1, Pt. 1), 19-21
Suggests that more emphasis be placed on retirement to than on retirement from the priesthood, since a priest never retires from his priesthood or from his basic commitment. Research on the aging priest is of recent origin. Depending upon the psychic and physical strength of the individual priest, preretirement planning has to explore where he will live, opportunities for study, recreation, hobbies, 2nd and 3rd careers, financial security in the form of pension systems, and provision for physical and spiritual care.
CLASSIFICATION: 09
SUBJECT TERMS: Religion/, Occupations/, Adjustment/, Physiological Aging, Gerontology; 43740, 35110, 00850, 38670, 21000
INDEX PHRASE: retirement, settling location & study opportunities & recreation & hobbies & 2nd & 3rd careers & financial security & provision for physical & spiritual care, priests

DOC YEAR: 1972 VOL NO: 48 ABSTRACT NO: 07026
Leadership training for pre-retirement programs in religious communities.
Hunter, Woodrow W.
Inst. of Gerontology, Ann Arbor, Mich.
Gerontologist 1972, Spr, Vol. 12(1, Pt. 1), 17-19
Stimulated by leadership workshops, several Catholic orders have begun systematic studies of aging and retirement needs. The Administration on Aging has made grants available to universities to train leaders in religious orders. Course outlines, methods, and organizational techniques are primarily concerned with the older sisters' basic needs: to be useful, to retain ties with the order, and to have freedom to choose where to live.
CLASSIFICATION: 09
SUBJECT TERMS: Gerontology, Religion/, Adjustment/, Leadership, Needs; 21000, 43740, 00850, 27930, 33180
INDEX PHRASE: leadership training for preretirement programs in religious orders, course outlines & methods & organizational techniques concerned with older sisters' needs

DOC YEAR: 1972 VOL NO: 48 ABSTRACT NO: 02745
Preretirement planning in a changing society.
Foley, A. R.
Columbia U., Div. of Community & Social Psychiatry
American Journal of Psychiatry 1972, Jan, Vol. 128(7), 877-881
Suggests that most individuals who face imminent retirement are not prepared for it due to factors such as forced early retirement and the individual's lack of preparation for confronting himself in a nonworking environment. It is concluded that retirees need transitional programs, similar to that provided by the Oliver Wendell Holmes Association, to help them examine their potentials, plan for the future, and lead a creative retired life.
CLASSIFICATION: 08
SUBJECT TERMS: Adjustment/, Physiological Aging, Occupations/; 00850, 38670, 35110
INDEX PHRASE: forced early retirement & nonworking environment preparation, need for preretirement programs

DIALOG File11: PSYCH ABS 67-MAR78 (Copr. Am. Psych. Assoc.) (Item 28 of 32) User1210 2may78

DOC YEAR: 1971 VOL NO: 45 ABSTRACT NO: 09043
The company, the individual, and the decision to retire.
Pyron, H. Charles; Manion, U. Vincent
U. Oregon, Coll. of Business Administration
Industrial Gerontology 1970, Win, No. 4,, 1-11
This preliminary survey on a long-range research program on phenomena of retirement preparation programs presents company policies, for retirement between ages 48-62. Questionnaire responses from a 201 nationwide sample are analyzed. 73 companies participated in a survey of 2053 of their early retirees (excluding disability retirees). 52% responded, of whom 3/5 were salaried, and 2/5 were hourly employees. The survey purpose was to ascertain current income and health status, to elicit information on attitude toward leisure, reasons for early retirement, and significance of preretirement preparation. 15% retired because they were too ill to work; 30% rated health as poor or fair at time of retirement; 23% felt that retirement was not entirely voluntary; 2/3 reported that their families encouraged them to retire; 28% thought co-workers encouraged their retirement; 15% viewed their retirement as encouraged by their company, 20% as discouraged, and 62% neutral; 3% made no response. 84% favored company help in planning for retirement. Retirees, in general, had a favorable attitude toward their companies. Few early retirees had returned to work. 80% felt that they had adequate income and that their plans for retirement had worked out satisfactorily.
CLASSIFICATION: 17
SUBJECT TERMS: ATTITUDES/, BUSINESS, BUSINESS AND INDUSTRIAL PERSONNEL; 04500, 07110, 07120
INDEX PHRASE: retirement preparation programs, company policy & employee attitude

DOC YEAR: 1970 VOL NO: 44 ABSTRACT NO: 07380
Preparing employees for retirement.
Pyron, H. C.
U. Oregon
Personnel Journal 1969, 48(9), 722-727.
The ''intensive-comprehensive'' preretirement counseling program described was the subject of a survey conducted among some 100 companies. Only 12 of the respondents had instituted counseling programs that satisfied the criteria of this model.
CLASSIFICATION: 17
SUBJECT TERMS: ADJUSTMENT/, PERSONNEL/, BUSINESS, SURVEYS, COUNSELING/; 00850, 37980, 07110, 50830, 12080
INDEX PHRASE: preretirement counseling programs, survey, satisfactory retirement adjustment

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DOC YEAR: 1968 VOL NO: 42 ABSTRACT NO: 17027
THE EMOTIONAL PROBLEMS OF RETIREMENT.
CHEN, RONALD
TOPEKA STATE HOSP., KAN.
JOURNAL OF THE AMERICAN GERIATRICS SOCIETY 1968 . 16(3). 290-295.
THE PROBLEMS OF RETIREMENT ARE DISCUSSED FROM THE VIEWPOINTS OF AGING, PRERETIREMENT REACTIONS, PSYCHOLOGICAL FACTORS, CLINICAL FINDINGS, AND THERAPEUTIC APPROACH. SUCCESSFUL ADJUSTMENT TO THE LATER YEARS MAY BE CONTINGENT UPON THE ELDERLY PERSON'S ABILITY TO RECOGNIZE HIS LIMITATIONS, TO GIVE UP WORK GRADUALLY, AND TO DEVOTE AN INCREASING PROPORTION OF HIS TIME TO LEISURE ACTIVITIES.
CLASSIFICATION: 38
SUBJECT TERMS: GERONTOLOGY, WORKING CONDITIONS; 21000, 57120
INDEX PHRASE: RETIREMENT, EMOTIONAL PROBLEMS + ADJUSTMENT FACTORS

DOC YEAR: 1968 VOL NO: 42 ABSTRACT NO: 09385
RETIREMENT AND THE INDIVIDUAL.
BORTZ, EDWARD L.
LANKENAU HOSP., PHILADELPHIA, PA.
JOURNAL OF THE AMERICAN GERIATRICS SOCIETY 1968 . 16(1). 1-15.
DISCUSSES THE EFFECTS OF RETIREMENT-ITS CHALLENGE, MEANING, POSITIVE VALUES, AND THE THREATS OF DISUSE AND LEISURE. PREVENTIVE GERIATRICS AND PRERETIREMENT COUNSELING ARE URGED. EMPHASIZING THE NEED TO HANDLE EACH CASE INDIVIDUALLY AND THE DISADVANTAGES OF COMPULSORY RETIREMENT. THE POSSIBILITIES FOR FULFILLMENT, PRODUCTIVITY, AND ENJOYMENT ARE DISCUSSED, CONSIDERING THE CAPABILITIES OF A RETIRED PERSON TO BE A FUNCTIONING MEMBER OF SOCIETY.
CLASSIFICATION: 14, 15
SUBJECT TERMS: GERIATRICS, COUNSELING/; 20970, 12080
INDEX PHRASE: RETIREMENT EFFECTS + COUNSELING

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DIALOG File11: PSYCH ABS 67-MAR78 (Copr. Am. Psych. Assoc.) (Item 32 of 32) User1210 2may78

DOC YEAR: 1968 VOL NO: 42 ABSTRACT NO: 03803
ORGANIZATIONAL STRUCTURE AND DISENGAGEMENT: THE EMERITUS PROFESSOR.
ROMAN, P.; TAIETZ, P.
CORNELL U.
GERONTOLOGIST 1967 , 7(3, PT. 1), 147-152.
ATTEMPTS TO ESTABLISH THE EXTENT OF ENGAGEMENT IN A SETTING WHERE OPPORTUNITIES FOR CONTINUED ENGAGEMENT ARE PROVIDED AFTER RETIREMENT. A SIGNIFICANT DEGREE OF CONTINUED ENGAGEMENT WAS FOUND WHERE SUCH OPPORTUNITY STRUCTURES ARE PROVIDED. THE EXTENT TO WHICH THE INDIVIDUAL'S PRERETIREMENT ROLE WAS SPECIFIC TO HIM WAS FOUND POSITIVELY RELATED TO CONTINUED ENGAGEMENT; AGE WAS NEGATIVELY RELATED TO CONTINUED ENGAGEMENT. THE FINDINGS POINT TO THE POSSIBILITY OF IMPROVING THE PREDICTIVE POWER OF DISENGAGEMENT THEORY BY INCORPORATING AN INTERVENING VARIABLE OF OPPORTUNITY STRUCTURE.
CLASSIFICATION: 08
SUBJECT TERMS: GERONTOLOGY, TEACHERS, OCCUPATIONS/, THEORIES/; 21000, 51690 35110, 52590
INDEX PHRASE: DISENGAGEMENT THEORY/JOB, EMERITUS PROFESSOR

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 15    28 PRERETIREMENT
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482816 ORDER NO: 74-23946
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EDUCATION, ADMINISTRATION

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SMITH, HERBERT BOOTH, JR. (PH.D. 1972 SAN FRANCISCO THEOLOGICAL SEMINARY).
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71F0231-0
PRE-RETIREMENT TRAINING IN THE UNITED STATES
ALBRECHT, RUTH E.
U OF FLORIDA, GAINESVILLE
SOCIOLOGICAL SYMPOSIUM, 1969, 2, SPR, 15-21.
Area/Section: 2100/43
Descriptors: COUNSEL ; DATA ; RETIRE ; SURVEY ; UNITED STATES
Identifiers: PRACTICES RETIREMENT SURVEY U.S. DATA

63A4149-0
SELECTIVE RETIREMENT AND PRE-RETIREMENT COUNSELING IN THE TVA
SHULTZ, E.B.
TVA PERSONNEL DIVISION
IND. LAB. REL. REV., 1959, 12, 2, JAN, 206-213.
Area/Section: 2100/43
Descriptors: COUNSEL ; RETIRE ; TENNESSEE
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